THE MARKET POTENTIAL FOR SKI VACATIONS IN BRITISH COLUMBIA

EXECUTIVE SUMMARY

ECONOMIC & REGIONAL DEVELOPMENT AGREEMENT

Canada

BC

LEGISLATIVE LIBRARY
VICTORIA, B.C.

THE MARKET POTENTIAL FOR SKI VACATIONS IN BRITISH COLUMBIA

Executive Summary

Prepared for:

Industry, Science and Technology Canada
Ministry of Regional Development
Ministry of Tourism and Provincial Secretary

funded by:

Canada - British Columbia Tourist Industry
Development Subsidiary Agreement

prepared by:

CAMPBELL GOODELL CONSULTANTS LIMITED

January, 1989

89-04978/

ACKNOWLEDGEMENT

This study was funded through the Canada-British Columbia Tourist Industry Development Subsidiary Agreement. The Agreement, which provides a variety of programs for tourism development, is cost shared equally by the governments of Canada and British Columbia. All of the activities undertaken through this Agreement are approved by a federal/provincial Management Committee established for the administration of the Agreement.

The Canada-British Columbia Tourist Industry Development Subsidiary Agreement is one in a series of subsidiary agreements under the Economic and Regional Development Agreement (ERDA) signed in November 1984, between the governments of Canada and British Columbia.

The responsibility for the content of this report is the consultant's alone, and the conclusions reached herein, do not necessarily reflect the opinions of those who assisted during the course of this investigation or the federal and provincial governments which funded the study.

industry, Science and Technology Canada

Industrie, Sciences et Technologie Canada

Province of British Columbia

Ministry of Regional Development

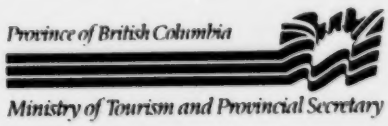


TABLE OF CONTENTS

Page

Introduction i

Background and Method ii

Summary Results:

City Profiles

Calgary 7
Chicago 7
Dallas 8
Edmonton 8
Los Angeles 9
Portland 10
Seattle 10
Spokane 11
Toronto 11
Vancouver 12
Victoria 13

Graphs and Charts

I. INTRODUCTION

This report concerns the results of a survey conducted by Campbell Goodell consultants for the Ministry of Tourism & Provincial Secretary in June of 1988. The survey, conducted with skiers from eleven North American cities, was intended to determine the size of the skier populations in each of the eleven markets, identify target consumer groups, and measure the awareness, appeal and potential demand for the B.C. product.

BACKGROUND AND METHOD

During June and July, 1988, Campbell Goodell Consultants conducted a telephone survey of skiers living in eleven cities in North America. The sample was based on a random selection of households in each city, and a random selection among the skiers living in a given household, in the cases where there were more than one. Only skiers over the age of 17 were interviewed, although data were also collected on skiers aged 17 or younger.

The following table shows the number of interviews completed in each city.

Calgary	101
Chicago	105
Dallas	100
Edmonton	100
Los Angeles	102
Portland	133
Seattle	208
Spokane	150
Toronto	202
Vancouver	200
Victoria	103
Total	1504

The result of this effort is an excellent sample which represents adult skiers living in the eleven largest markets for British Columbia ski destinations in North America.

SUMMARY RESULTS

From the perspective of marketing, we need to answer four questions:

First, how large is the potential market? In this case, we are concerned about destination skiers, those who spent at least one night at a ski destination during the 1987-88 season.

Second, how many of these people already ski in B.C., and how many are there who would be new recruits to the B.C. ski market, if they could be convinced to come here?

Third, what is the likelihood of attracting these skiers to British Columbia?

Finally, what proportion of total households do these people represent in each city? This information will be important in the calculation of the expected return on media expenditure in each market.

To answer these questions, we have compiled the following information.

	Penetration	Percent Knowing Nothing About B.C. Areas	Percent Using Airplane
Calgary	79	22	3
Chicago	0	90	38
Dallas	3	79	65
Edmonton	46	21	8
Los Angeles	4	78	25
Portland	5	66	6
Seattle	21	51	6
Spokane	66	51	3
Toronto	27	55	11
Vancouver	96	5	2
Victoria	85	11	12

The three columns in this table represent the following: Penetration is the percentage of the destination skiers in each city who have skied in B.C. during the 1987-88 season (for Victoria and Vancouver, it is the proportion of all skiers who have skied in B.C.). The second column is self-explanatory. The third column gives the percentage who travelled by airplane to reach the destination which was farthest from their home last season.

The next table continues this presentation by reporting the number of households existing in various categories.

	Total House-holds	Destina-tion House-holds	B.C. Skier House-holds	Potent-ial House-holds
	(all entries are times 1000)			
Calgary	249	28	22	6
Chicago	2,290	57	0	57
Dallas	910	34	1	33
Edmonton	283	32	15	17
Los Angeles	3,090	129	5	123
Portland	465	21	1	20
Seattle	701	36	8	28
Spokane	140	5	3	2
Toronto	1,200	42	11	31
Vancouver	532	35	34	1
Victoria	105	10	9	1

The last column in this table is the critical one. It tells us how many destination skier households there are containing no skier who skied in British Columbia last season.

These results may be summarized in the following manner:

Group 1.

Los Angeles

Los Angeles is a market unique unto itself. It is by far the largest of those in this study, especially in terms of potential. Almost 40 percent of all the destination skier households in the study, in which skiers did not travel to B.C. last year, are located in the Los Angeles area.

Los Angeles is also located on the West Coast. It is only 28 percent further to fly to Vancouver, for example, than it is to fly to Denver. Moreover, a substantial proportion of destination skiers flew to at least one destination last year.

Four percent of the total number of households in Los Angeles fall into the potential category. Clearly, media which are targeted to the skier population will be far preferable to those which reach the general population.

Seventy-eight percent of the Los Angeles skiers say they know nothing about skiing in B.C. Basic awareness of this province and the ski facilities must be the first priority for media advertising.

Group 2.

Chicago
Dallas
Toronto

These three cities are grouped on the strength of the fact that they are all a long way from British Columbia, and they are all very large. Over 132,000 skier households exist in these three cities, and nearly 120,000 of them did not ski in British Columbia last year. (Virtually all who did came from Toronto.)

Knowledge of B.C. ski areas ranges from poor in Toronto (55 percent say they know nothing) to almost non-existent in Chicago.

Fortunately, destination skiers in these cities have the habit of taking airplanes to go skiing. This is especially true in Dallas, not surprisingly.

Therefore, marketing should be addressed to the destination skier who travels by air, and who has little or no awareness of B.C. ski destinations. In Toronto, where awareness is higher, the message might be tailored in other ways (see the subsequent section of this report).

In Dallas, destination skiers make up 3.6 percent of all households. The figure is 2.5 percent in both Toronto and Chicago. This suggests again that media which target skiers will likely be more cost efficient than media which reach a broader market.

Group 3.

Seattle
Portland
Edmonton

These three cities are united by two characteristics. They are all reasonably large, and have among them 65,000 potential destination skier households. And obviously, they are all close to British Columbia.

The key difficulty to be faced in convincing these skiers to visit B.C. will be the fact that they nearly all travel by automobile to their ski destinations. Very few of these people have gone beyond driving distance to ski. The marketing task will therefore be to convince them to travel beyond the Rockies, or beyond the ski areas in the Cascades, in order to ski British Columbia.

This task may be easier in Seattle and Portland than it is in Edmonton, for two reasons. First, the ski areas in the Rockies are excellent, and the incentive for Edmontonians to travel past them to get into British Columbia has to be strong to achieve the result. Second, the Americans have far less awareness of British Columbia ski opportunities than do the Albertans.

In Edmonton, 6 percent of the total households fall into the potential category. The comparable figures for Seattle and Portland are 4 and 4.3 percent, respectively. Media should be directed toward the skier who drives to his or her destination, in all cases. In the American cities, basic awareness of the product must be the first goal of marketing. In Edmonton, the task will be to convince the skier of the superior value of British Columbian sites, as compared to those on the Alberta side of the Rockies.

Group 4.

Vancouver
Victoria
Calgary
Spokane

These cities are grouped together primarily because they are the best suppliers of skiers to B.C. ski destinations already. There are very few potential households, only 10,000 in all four cities put together. In other words, over 80 percent of the destination skiers in these markets already ski in British Columbia.

The public relations task will therefore be to maintain the current levels of behaviour, rather than to create new visitors to B.C.

In summary, Los Angeles appears to hold the greatest potential for the future marketing of B.C. destination skiing. It has the dominant population, as well as adequate commitment to airplane travel, and a location which places Vancouver at relatively the same distance as the American Rockies destinations.

Marketing to Group 2, also an airplane market, may be too expensive to be considered by individual resorts, but should have potential for a marketing program with province-wide financial support. In our judgement, it will be easier to convince a resident of Dallas to fly to Vancouver instead of Denver, than it will be to convince a resident of Portland to drive to Whistler rather than to Mt. Hood. We therefore recommend that Group 2 constitute the second priority for marketing efforts by the province.

Group 3, on the other hand, represents an automobile market, and represents a good set of targets for individual B.C. ski resorts. Their marketing programs should be constructed with the realization that the major barrier to visiting B.C. will be the length of the trip by automobile, as compared to the easier access to local destinations.

Group 4 should definitely not be neglected, since these markets are currently the best sources, per capita, for B.C. ski resorts. Very few new skiers will come from these areas, however, and the marketing task will be primarily to maintain market share.

CITY PROFILES

Calgary

Calgary has an above-average number of skiers per household and an above-average incidence of people who ski both downhill and cross-country. Calgary's active skiers averaged 10 days of skiing last season, and 72% skied more than 5 times (vs. 64% in the total survey of 11 cities). 39% of active skiers in Calgary went on overnight ski trips last season and they averaged 3.4 nights per trip.

Demographically, Calgary skiers are fairly typical. Downhill skiers tend to be males, age 34 and under, with household incomes of $35,000 to $60,000. Cross-country skiers tend to be females, age 35 and older, with incomes of $35,000 to $60,000. The percentage of older cross-country skiers in Calgary appears to be higher than the average for all cities. Calgary skiers also tend to have had fewer years of education than the averages for the total sample.

A larger proportion of Calgary skiers have taken ski lessons in the past than in the entire sample, but they are no more likely to take lessons in the future than their counterparts in other cities. 31% of Calgary's active skiers skied in B.C. last season (the highest of any city outside B.C.). Three out of four active skiers in Calgary said it is likely they will ski in B.C. in the future (vs. 63% in the total sample).

Like skiers in most cities, Calgarians rate B.C. favourably on the important factors of variety of runs, weather/snow conditions, staff friendliness, and quality of overnight accommodations. In addition, Calgary skiers like B.C. for its short lift lines and overall cost.

Chicago

In Chicago, about 60% of the skiers are the only skiers in their households (the highest of any city studied). There are slightly more lapsed skiers in Chicago than the average of the 11 cities, slightly fewer downhill skiers, and more who ski both downhill and cross-country. Active skiers in Chicago averaged 8 days last season, fewer than any other city in this survey. 47% went on overnight ski trips, averaging 4.5 nights per trip.

Chicago skiers are better educated than average, are more likely to have incomes over $60,000 (especially cross-country skiers), and include more females than other cities. Downhill skiers are both males and females, age 34 and under, while cross-country skiers are mostly females, age 25 and older.

Nearly 90% of the Chicago skiers interviewed said they know nothing at all about ski resorts in B.C., and no one in our sample skied in B.C. last season. Chicago skiers place importance on variety of runs, weather/snow conditions, short lift lines and cost.

Dallas

The number of skiers per skiing household in Dallas (an average of 1.8) is among the highest in the 11 cities surveyed, but Dallas also has a relatively low proportion of those who skied last season. 80% of Dallas skiers are downhill skiers, a very high proportion compared to other cities. Dallas skiers averaged 8.4 days last season (the lowest for any city except Chicago). 67% went on overnight trips and they averaged 4.8 nights (longer than most other cities and second only to Los Angeles at 5.0 nights).

Skiers in Dallas are similar in age to skiers in other cities (under 35 for downhill and over 25 for cross-country). However, they are far better educated and have much higher incomes than is true of other cities. There is also a slight tendency to be more women skiers than men, while in other cities this ratio is reversed.

80% of Dallas skiers say they know nothing at all about B.C. ski resorts and only 2% of our sample skied in B.C. last season. 30% say a ski trip to B.C. is either very or somewhat likely in the future. Like skiers in other cities, they look for weather/snow conditions, short lift lines and a variety of runs.

Edmonton

With 1.7 skiers per skiing household, Edmonton is about average among the 11 cities surveyed. 52% of the skiers skied last season, which is somewhat below the 60% average for the 11 cities. Cross-country, at 23% of Edmonton skiers (plus 31% who do both), is more popular than in other cities. The average skier skied 11.1 days last season (slightly above average), 63% went on overnight trips, and the average trip was 3.6 nights (compared to 3.9 for the average city).

Downhill skiers in Edmonton are males and females evenly (compared to other cities where males dominate downhill), age 34 and under. Cross-country skiers are slightly more likely to be female, and in the 25 to 44 age groups. Compared to other cities, Edmonton skiers are less likely to be 45 or older; they are less likely to have attended university (as is true of all of the Canadian cities, as compared to the American cities), are more likely to have incomes between $25,000 and $35,000, and are less likely to earn more than $35,000.

Not surprisingly, awareness of B.C. ski destinations is higher in Edmonton than some other cities, but 22% say they know nothing about B.C. ski resorts. Fortunately these are primarily lapsed (only 4% of active skiers say they know nothing about B.C. ski resorts. 29% of all active Edmonton skiers skied in B.C. last year (similar to Calgary's rate). Edmonton skiers are very positively predisposed to skiing in B.C. in the future, with 63% calling it very likely. They see the strengths of B.C. ski destinations as the variety of runs, the weather/snow conditions, staff friendliness, quality of the overnight accommodations, and the short lift lines. Cost is not seen as a serious disadvantage.

Los Angeles

With 1.6 skiers per average skiing household, Los Angeles is about average among the 11 cities surveyed. Nearly 70% of all skiers skied last season, somewhat more than the average city. Los Angeles has the highest proportion of downhill skiers (81%) of any city studied. These skiers averaged 11.2 days last season (just behind Vancouver at 12.3 and Seattle at 12.1). 67% of the active skiers took overnight trips, which averaged 5.0 nights--longer than any other city in the survey.

Los Angeles skiers are more highly educated than skiers in any other city except Chicago and Dallas, are much more likely to have incomes over $35,000 than residents of the other cities, and are more likely to be men than the skiers in any other city. Downhill skiers tend to be under age 35 (similar to other cities). Los Angeles skiers are more likely to have taken skiing lessons than skiers in any other city, although they don't take them regularly.

78% of Los Angeles skiers know nothing at all about B.C. ski resorts (similar to Dallas at 79% but better than Chicago at 90%). Only 3% of our sample had skied in B.C. last season and nearly a third say that doing this in the future is either very or somewhat likely. Los Angeles skiers perceive B.C. to have the advantages of short lift lines, good weather/snow conditions, variety of runs, staff friendliness and the quality of overnight accommodations. Cost is seen as a threat.

Portland

The average skier household in Portland has 1.7 skiers, about average among the 11 cities surveyed. With 61% who skied last season, Portland is slightly above average in proportion of active skiers. There are somewhat more cross-country skiers in Portland (21% plus 20% who do both) than in the sample as a whole. Portland skiers averaged 10.2 days last season, similar to the average of all 11 cities. Only 43% took overnight ski trips, well below the average city, and these trips averaged only 3 nights, also low in comparison to other cities.

Downhill skiers in Portland, like most other cities, tend to be males age 34 and under. Cross-country skiers are both males and females (unlike most cities where the majority are females) aged 25 and up. Portland skiers are a little more likely to have either some college, or an advanced degree (but are less likely to have a bachelor's degree). 47% have never taken ski lesson, the highest percentage of any city in the survey.

67% of Portland skiers know nothing at all about B.C. ski resorts, somewhat surprising considering the proximity. Only Chicago, Dallas and Los Angeles have higher percentages. Only 2% skied in B.C. last season, again surprisingly poor, and only 16% say it is very likely that they will do so in the future (the only cities with lower scores were Chicago at 7% and Los Angeles at 13%). Portland skiers see B.C.'s strengths as variety of runs and staff friendliness, while threats include lift lines, overall cost, and weather/snow conditions. Distance from home is seen as relatively unimportant.

Seattle

With 1.8 skiers per skier household, Seattle ranks at the top of the 11 cities in this survey and Seattle also has the highest proportion of active skiers (71% skied last season). These skiers averaged 12.1 days of skiing last season, placing Seattle second only to Vancouver at 12.3 days. Only 39% went on overnight ski trips last season, below most cities, and the average trip was 3.5 nights, also slightly below that of other cities.

Downhill skiers in Seattle are males and females about equally (unlike other cities where the majority are males), aged 44 and under (slightly older than other cities). Cross-country skiers tend to be females over age 25, as is typical in most cities. Overall, Seattle skiers are somewhat better educated than skiers in other cities.

Over half the Seattle skiers interviewed said they know nothing at all about B.C. ski resorts, and just 8% skied in B.C. last year (a low number, given the proximity). Seattle skiers see the strengths of B.C. ski destinations being the variety of runs, the quality of overnight accommodations and the weather/snow conditions. Cost is seen as a major problem and downhill skiers in Seattle are sensitive to the length of lift lines.

Spokane

Spokane has only 1.5 adult skiers in each skier household, the smallest in the study, along with Victoria. 64% skied last season, a bit above average for the 11 cities, but they skied only 9.4 days each, fewer than any except the residents of Chicago (7.9 days) and Dallas (8.4 days). 29% of Spokane skiers went on overnight trips last season and the trips averaged 3.2 nights; both of these numbers are below most other cities.

Demographically, Spokane skiers are like those in other cities. Downhill skiers tend to be young males and cross-country skiers tend to be females and ages over 25. Spokane skiers are often older than other cities, are about average in education, and are slightly below average in income. Half of them have never taken lessons, the highest number of any of the 11 cities, and they are less interested in taking lessons in the future than skiers in any other city.

Half of all Spokane skiers say they know nothing at all about B.C. ski resorts, typical of most cities in spite of Spokane's proximity to B.C. 19% said they skied in B.C. last season, the highest of all the American cities and higher than Toronto (9%). Almost 70% say they are very or somewhat likely to ski B.C. in the future. Downhill skiers in Spokane are especially positive about the variety of runs to be found at B.C. ski resorts, as well as the short lift lines and staff friendliness. Cross-country skiers see staff friendliness as the major strength of B.C. Cost and distance from home are seen as problems.

Toronto

Skier households in Toronto average 1.7 skiers each and 60% of them skied last season; both of these numbers are typical of the 11 cities surveyed. There are fewer downhill skiers and more cross-country skiers in Toronto than in other cities. Toronto skiers averaged 10.9 days of skiing last season, about the average for the 11 cities. 38% went on overnight ski trips last year, for an average of 4.1 nights (placing Toronto fourth behind Los Angeles, Dallas and Chicago).

Toronto skiers are demographically average compared to other cities. Downhill skiers tend to be males under age 35, while cross-country skiers are usually females over age 25. 45% have never taken ski lessons, which is also average for our 11 cities.

54% of Toronto skiers know nothing at all about B.C. ski resorts, but 9% skied here last season. 57% say they are very or somewhat likely to ski in B.C. in the future, which puts Toronto in the middle of the 11 cities on this measure. Toronto skiers feel that distance from home is a very weak aspect of B.C. destinations, but they do not think this is an important factor in their decisions. They feel that the major strengths of B.C. ski destinations include the variety of runs, the weather/snow conditions, staff friendliness, the quality of overnight accommodations and shortness of lift lines.

Vancouver

There are 1.6 skiers in the average Vancouver skier household and 64% of them skied last season; both of these numbers are about average among the 11 cities surveyed. Vancouver skiers reported an average of 12.3 days of skiing last season, the highest of all 11 cities. 45% went on overnight ski trips, which averaged 3.5 nights (shorter than skiers in most cities, as would be expected).

Vancouver skiers differ demographically from those in other cities in that they are less well-educated and slightly less wealthy. Like skiers in other places, downhill skiers tend to be males under age 35, while cross-country skiers tend to include slightly more females and age groups from 25 to 44. 45% have never taken ski lesson, slightly more than in other cities.

Not surprisingly, Vancouver skiers are the most knowledgeable of any group in the sample about B.C. ski resorts, with only 7% knowing nothing at all. Nearly all of them (96%) skied in B.C. last season and intend to do so in the future. On-hill conditions dominate the priorities of Vancouver skiers when they name the factors they use in selecting a ski destination. These include good variety of runs, good weather/snow conditions and short lift lines. Cost is only fourth in importance. Significantly, cost and length of lift lines are seen as shortcomings of B.C. ski resorts. This is an interesting contrast with the perceptions of Toronto skiers, who think that lift lines in B.C. are short, or Edmonton skiers, who are not nearly so sensitive to the cost of skiing in B.C.

Victoria

Victoria reports 1.5 adult skiers per household, well below the average. Only 50% of Victoria skiers skied last season, fewer than any other city except Dallas, but they skied an average of 10.6 days, similar to the average of other cities. 75% of Victoria skiers went on overnight trips, the highest for any city in the survey, but the average length of the trips at 3.6 nights is somewhat below the overall sample.

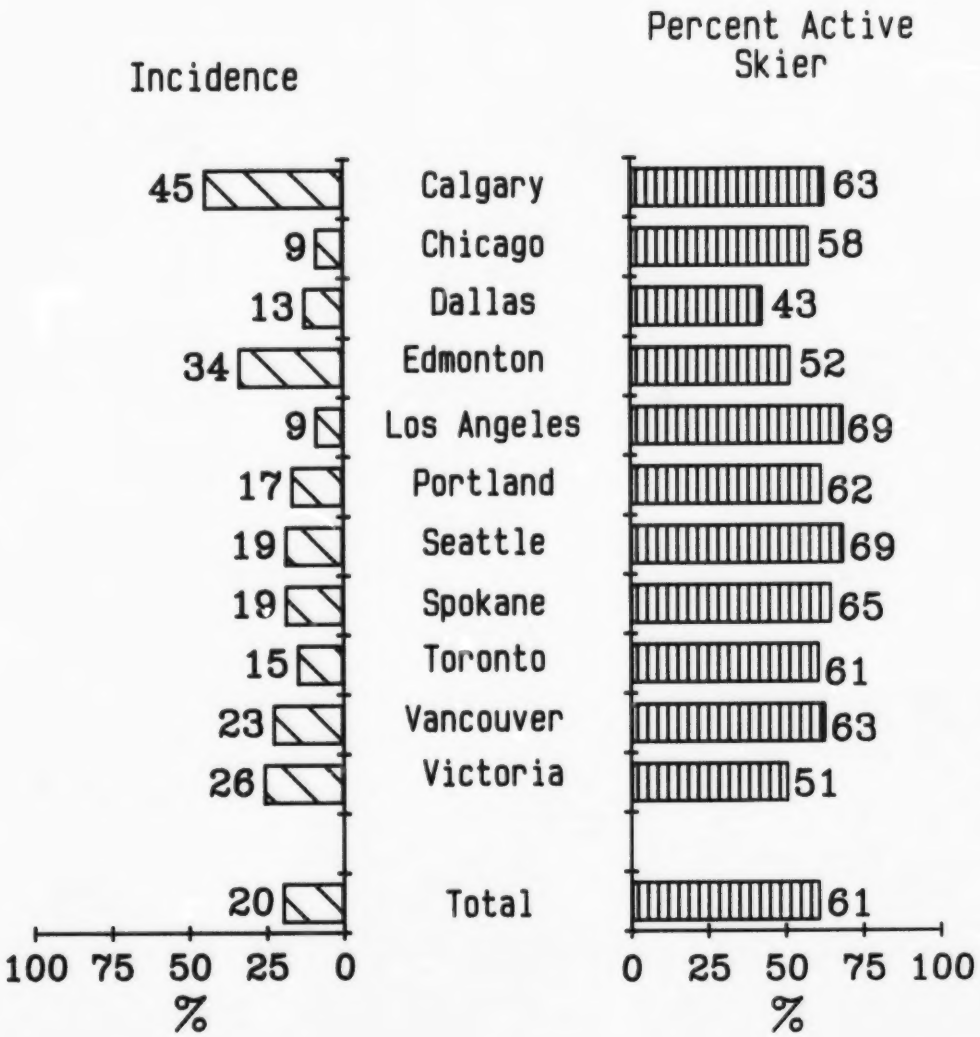
Demographically, Victoria skiers are less well educated and have lower incomes than some other cities. As we found in many cities, downhill skiers tend to be males and under age 35, while cross-country skiers are most often females and over the age of 25. 38% have never taken ski lessons.

12% of Victoria skiers say they know nothing at all about B.C. ski resorts, and 85% skied in B.C. last season. The variety of runs, staff friendliness, weather/snow conditions and the quality of overnight accommodations are the major strengths of B.C. ski resorts to Victoria skiers. Cost and the length of lift lines are seen as shortcomings. Cross-country skiers in Victoria are also sensitive about the distances they have to travel.

SIZE OF THE SKIER MARKET

Chart 1 presents the incidence of households containing at least one adult who skied within the past ten years, and the percentage of those who skied last season (1987-99).

Incidence of Skier Households and Percentage of Adult Skiers Who Skied last Season

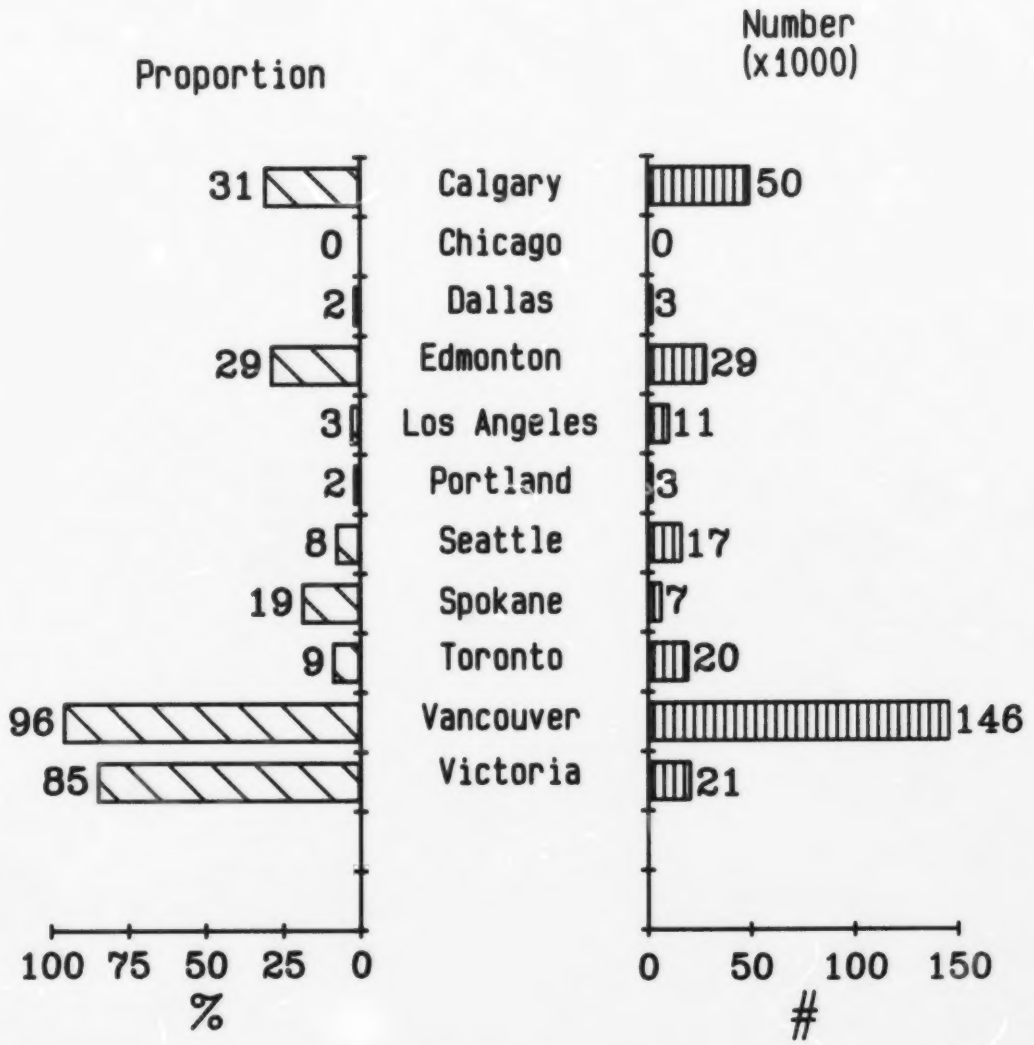


Prepared by Campbell Goodell Consultants

Chart 2 presents the proportion of current skiers who skied in British Columbia at least once last year, and the estimated number of skiers this represents.

This chart shows that B.C. ski resorts do especially poorly among skiers in Seattle and Portland. These two cities should be singled out for future marketing efforts.

Proportion and Number of Active Skiers who Skied in B.C. last Season

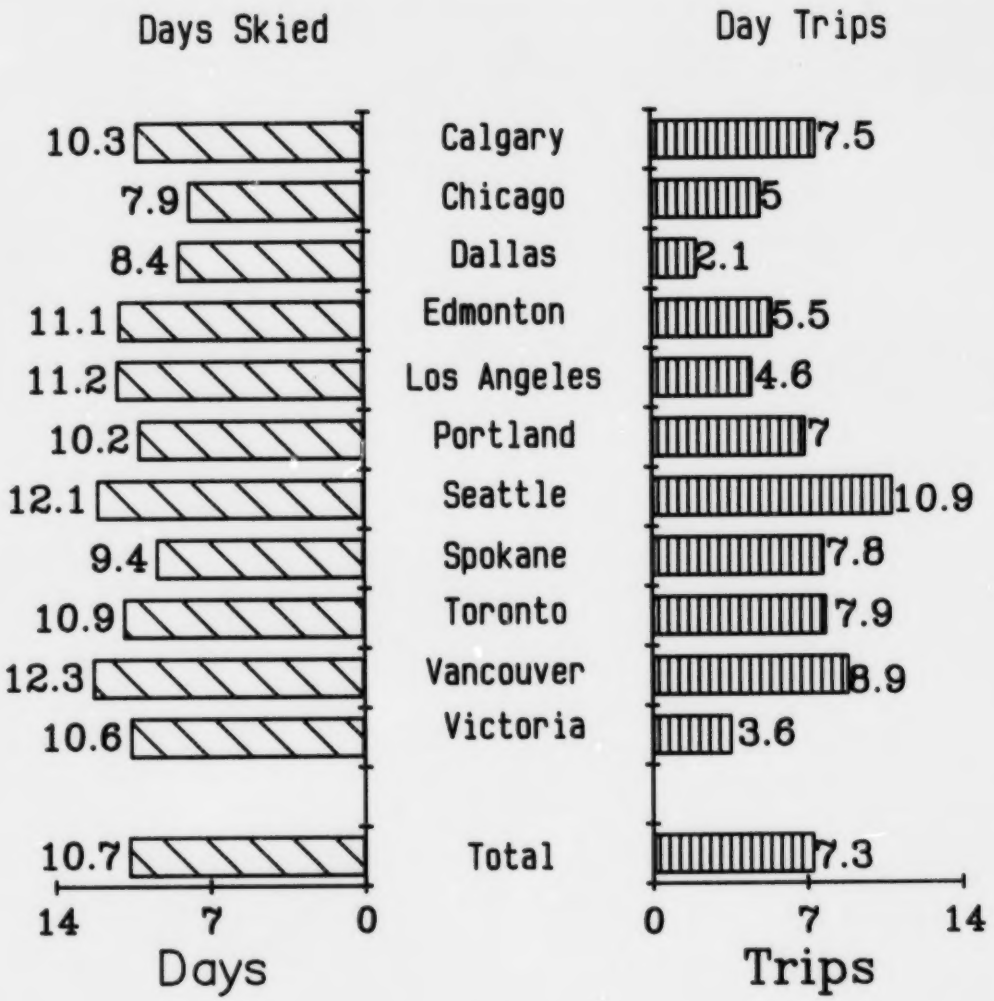


Prepared by Campbell Goodell Consultants

Chart 3 displays the average number of days skied last year and the average number of day trips taken.

As a general rule, cities which are closer to ski destinations show a higher than average number of days skied, but this is true only to an extent. Chicago and Dallas skiers still averaged 8 days last season, and Los Angeles skiers averaged eleven.

Average Number of Days Skied last Season, and Average Number of Day Trips



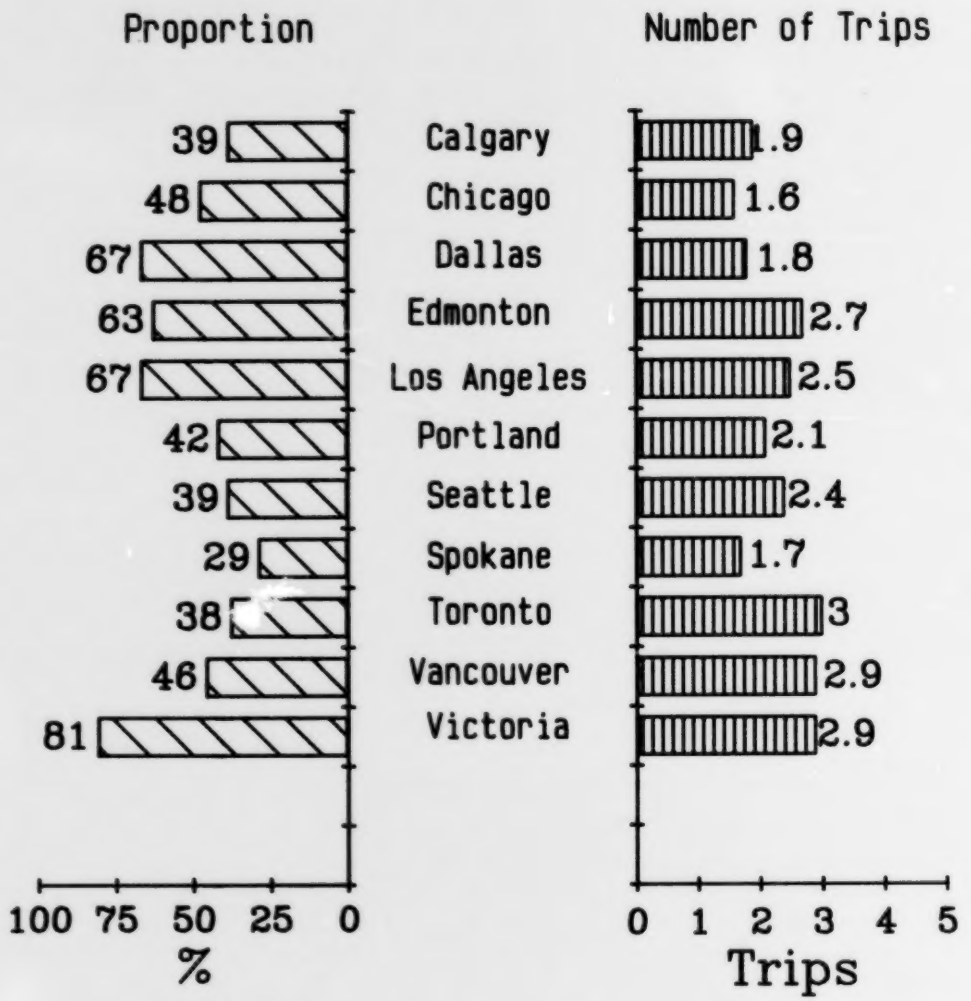
Prepared by Campbell Goodell Consultants

Chart 4 presents the proportion of active skiers taking at least one overnight trip and the average number of trips taken by these skiers.

As expected, we find high proportions of skiers taking overnight trips in the cities which are not located near ski destinations; this is especially true for the sun-belt cities of Los Angeles and Dallas. The lower proportions tend to be reported by snow-belt cities with day areas nearby.

As a rule, the farther the skier travels, the fewer trips he or she makes. Calgary does not fit this pattern, but ski habits in that city were undoubtedly disrupted by the Olympics.

Proportion Taking Overnight Trips, and the Average Number of Trips Taken



Prepared by Campbell Goodell Consultants

Chart 5 shows the proportions of those taking overnight trips in each city (except for Vancouver and Victoria) who skied at least once in British Columbia. This gives a direct measure of the penetration of B.C. ski destinations into each of these markets.

These data repeat our earlier contention that Seattle and Portland (especially Portland) are under-penetrated. A greater proportion of overnight skiers come to B.C. from Toronto than from Seattle!

These figures also show that while B.C. has had very little success in marketing to the more distant cities, there is much room for improvement and even small increases will bring large numbers of skiers to the province. Los Angeles, we recall, even at a 4 percent penetration rate, still supplies over 11,000 skiers, or 4,000 more than Spokane, with its 66 percent penetration rate.

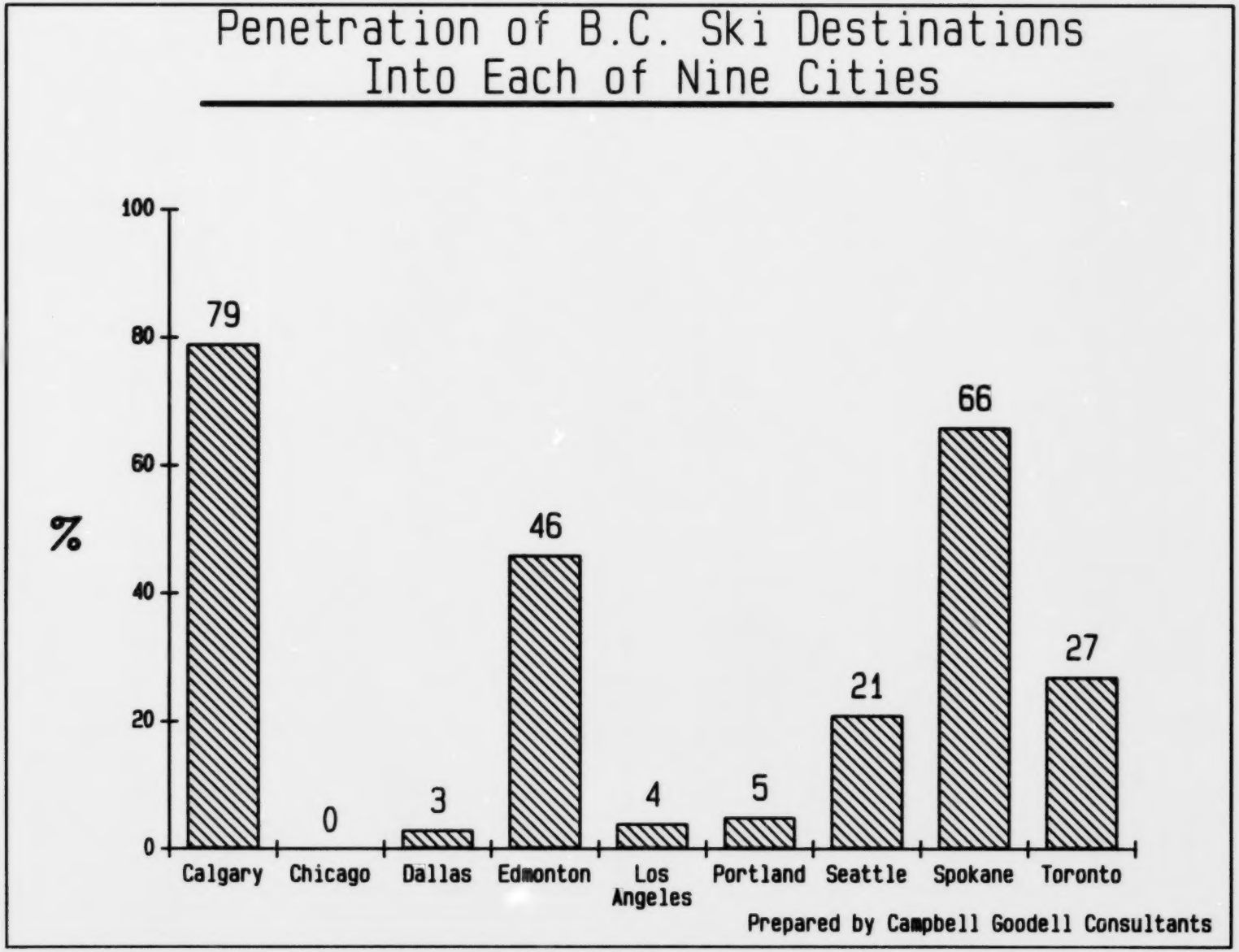
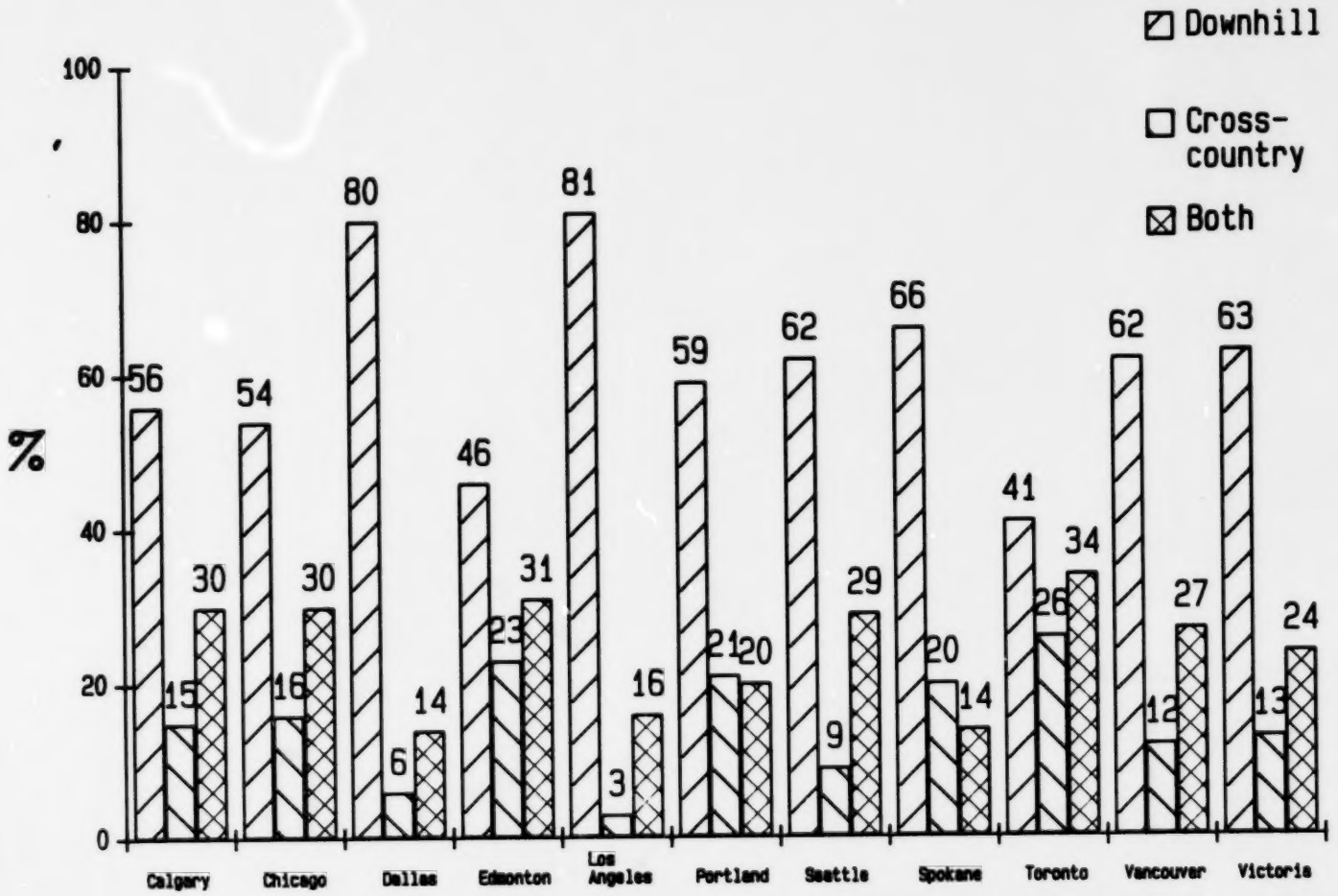

Penetration of B.C. Ski Destinations
Into Each of Nine Cities
%
100
80
60
40
20
0
79
0
3
46
4
5
21
66
27
Calgary
Chicago
Dallas
Edmonton
Los Angeles
Portland
Seattle
Spokane
Toronto
Prepared by Campbell Goodell Consultants

Chart 6 shows the proportion of skiers who ski downhill, cross country and both downhill and cross country. To some extent this division is determined by geography; there are few cross country skiers in Dallas or Los Angeles. However, there are also relatively few in Seattle, and relatively many in Portland.

Proportion of Skiers Skiing Downhill, Cross-country, and Both

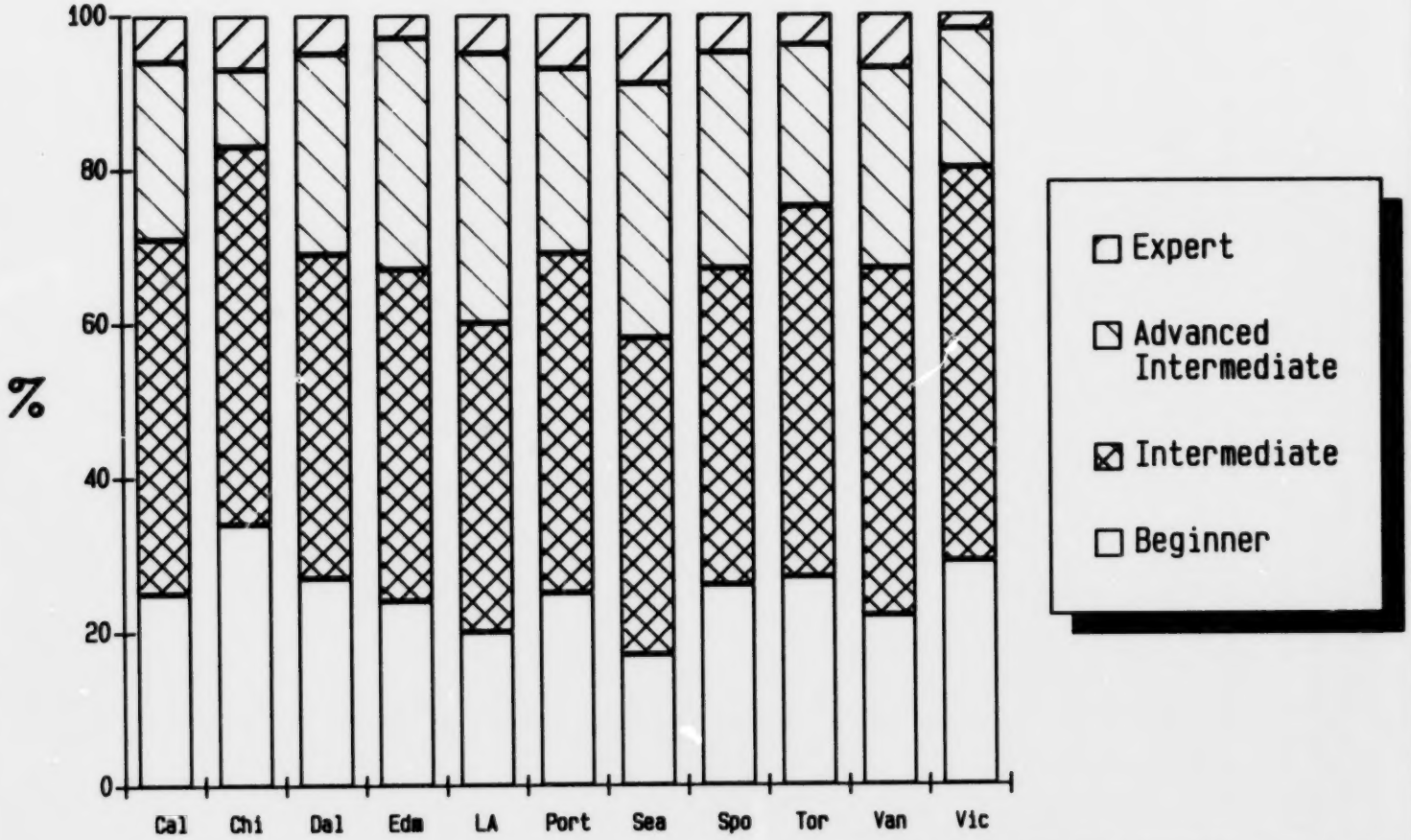


Prepared by Campbell Goodell Consultants

CONSUMER TARGET GROUPS - LAPSED SKIERS

Chart 7 shows how skiers in the eleven cities rate their skill. There is very little variation from city to city, except that Seattle has fewer beginners and Chicago has more. Obviously, marketing should be targeted at the intermediate skier (beginners tend not to travel long distances).

Skill Level



Prepared by Campbell Goodell Consultants

Chart 8 displays the reasons lapsed skiers give for not skiing last year. While lack of time was the most common single reason given, the various aspects of cost put this factor in second position. Babies and children come third, followed by health and injury. A small number of skiers have problems with the ski facilities themselves, commenting either on the weather and snow conditions or the crowding.

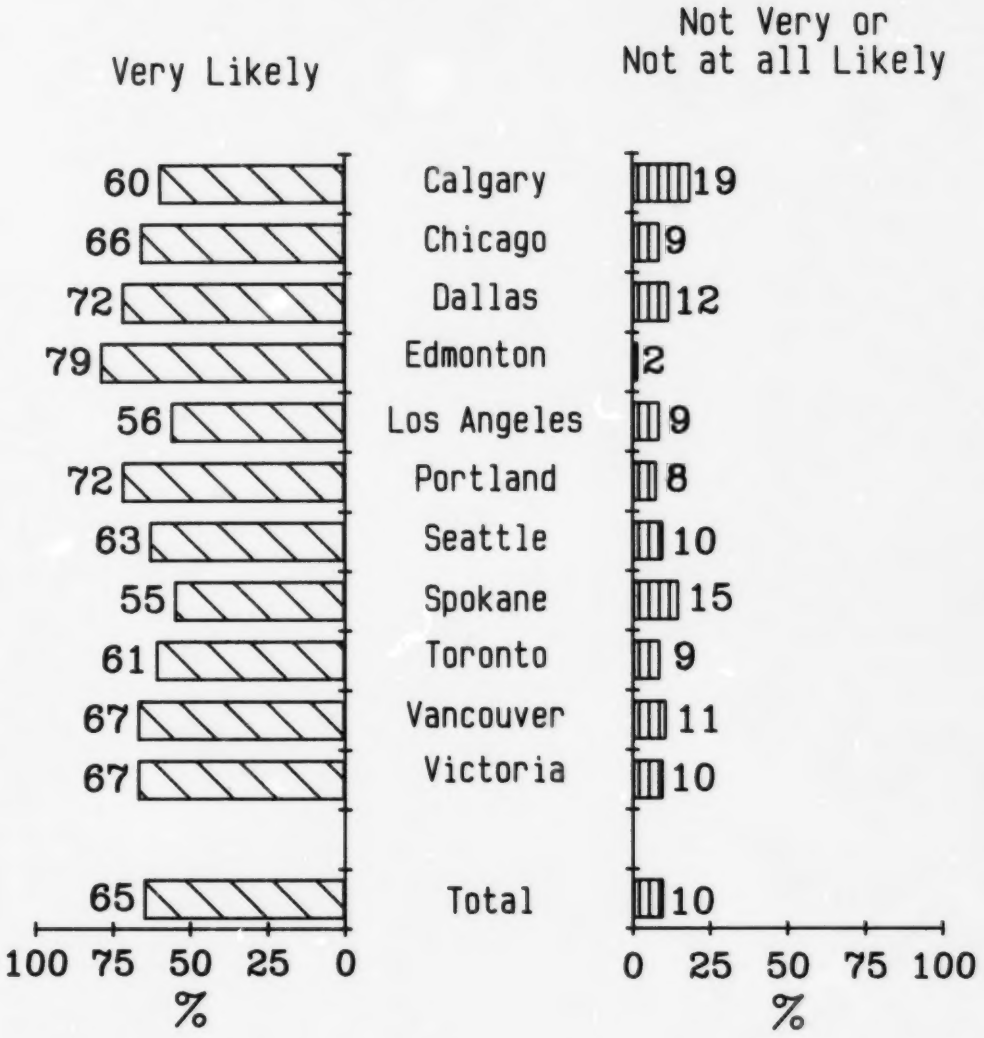
Chart 8:
Main Reason Respondent has not Skied More Recently

	Percentage (%)
No Time/Too Busy/Have Other Interests	48
Costs too much	15
Have Children/Baby	14
Health Reasons	9
Lifts cost too much	8
Transportation/Access too difficult	8
Poor Weather/Snow Conditions	7
Equipment costs too much	7
"Just don't ski anymore"	5
Lived in Area not Conducive to Skiing	5
Mortgage/financial obligations	5
Friends Don't Ski	4
Ski Injury/Accident	4
Transportation costs too much	4
Local hills too crowded	3
Family No Longer Ski	2
Too Far/Long Distance to Travel	2
Getting Too Old	2
Was Pregnant	1
No Child Care Facility	1
Prefer Warm Weather Vacations	1
Prefer Other Sports to Skiing	1
Don't Like Sport/Not Interested	1
Base	(586)

Chart 9 presents the likelihood that lapsed skiers have of skiing again in the future.

We can easily see that most lapsed skiers think it is very likely that they will ski again; somewhat fewer in Los Angeles, Spokane and Toronto, somewhat more in Edmonton and Dallas. The message here is that it may be a mistake to focus all marketing on the active skier along, especially in improving economic times.

Lasped Skiers' Likehood of Skiiing Again in the Future



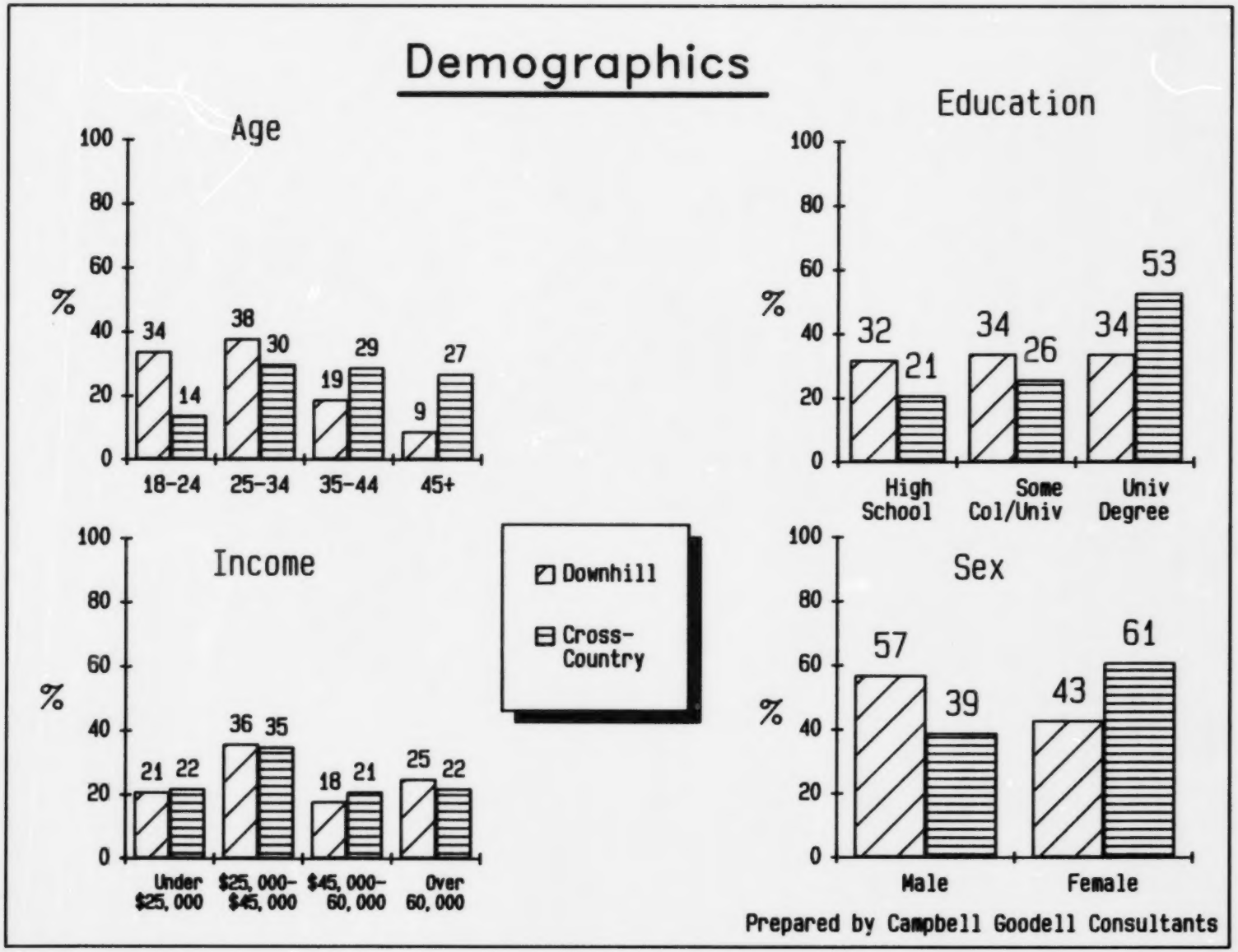
Prepared by Campbell Goodell Consultants

CONSUMER TARGET GROUPS - DEMOGRAPHICS

Chart 10 presents the demographic profiles of downhill and cross country skiers.

We can see that skiers are generally young, and that this is especially true of downhill skiers. The cross country skier age profile is much closer to the population average. Skiers are extremely well-educated, and this is particularly true of cross country skiers. Skiers also do very well financially. This is particularly the case among downhill skiers, who equal the incomes of the cross country skiers, in spite of being younger and having less education. Finally, downhill skiers tend slightly to be men, while their cross country counterparts tend to be women.

Demographics

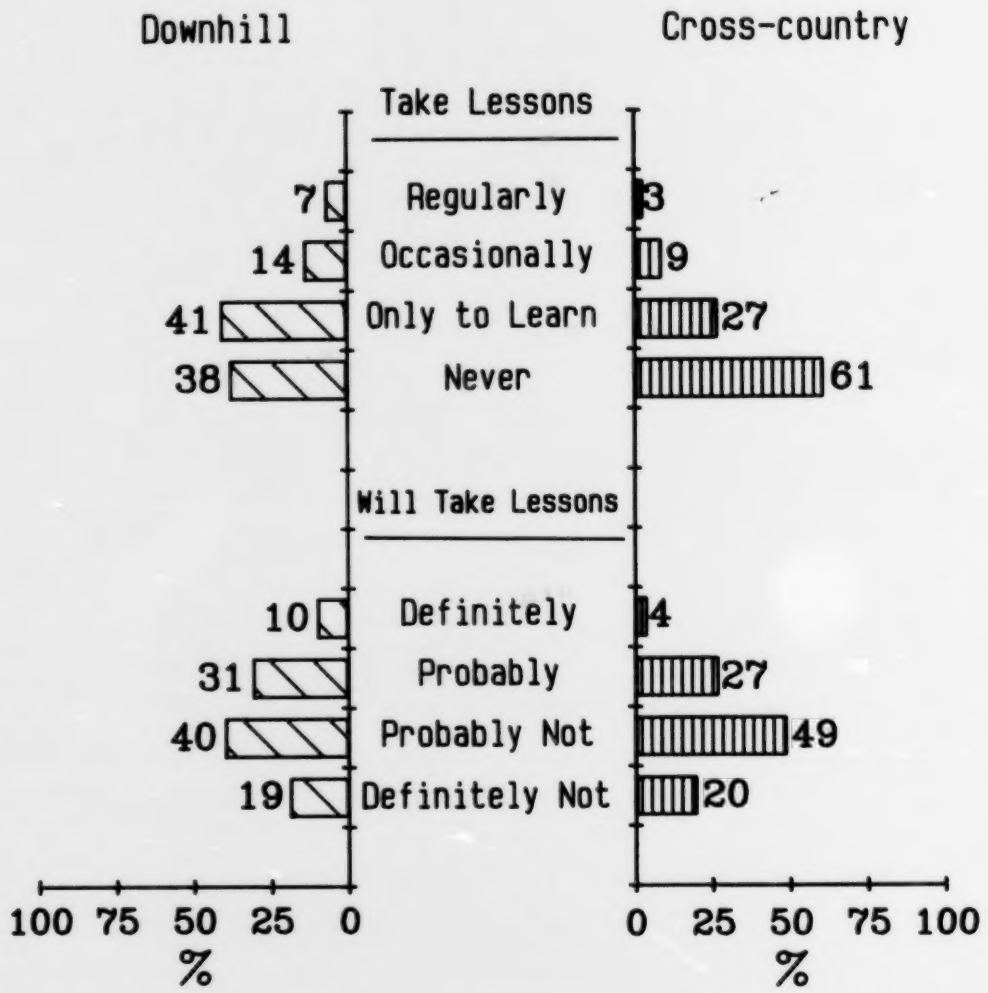


Prepared by Campbell Goodell Consultants

Chart 11 displays the experience both downhill and cross country groups have had with ski lessons, and the likelihood they will take lessons in future.

We see that about a fifth of the downhill skiers have taken lessons beyond what was required to learn how to ski, and about twice this number think they will definitely or probably take lessons in the future. the numbers are commensurately smaller for corss country skiers, three fifths of whom have never taken lessons at all.

Experience with Ski Lessons and Probability of Taking Them in Future



Prepared by Campbell Goodell Consultants

AWARENESS OF THE B.C. PRODUCT AND EFFECTIVENESS OF EXISTING MARKETING

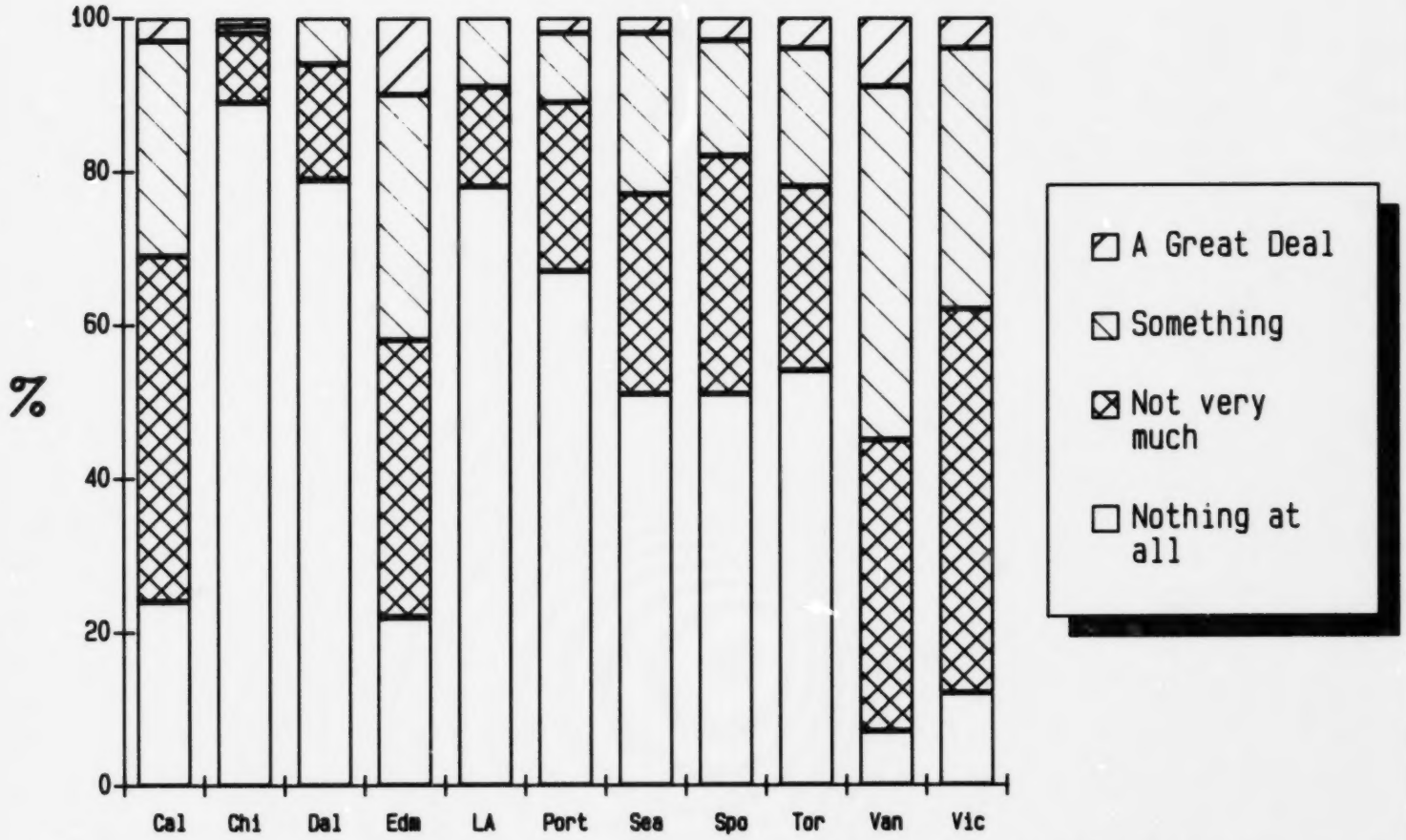
Chart 12 shows the level of awareness registered by residents of the eleven cities, of B.C. ski destinations.

This chart explains in part why so few skiers come to B.C. from certain of these cities. Levels of awareness in Seattle and Portland specifically are quite low. One of the major components of marketing in these locations should be to establish a sense of what there is in B.C.

In Alberta cities, awareness is already fairly high, and marketing can move on to second-level objectives.

Skiers mention Whistler (37 percent), Mount Washington (8 percent), Grouse (6 percent), Red Mountain (6 percent), Big White (5 percent), and Blackcomb (5 percent) most frequently as destinations they know the most about.

Amount of Knowledge of B.C. Ski Resorts

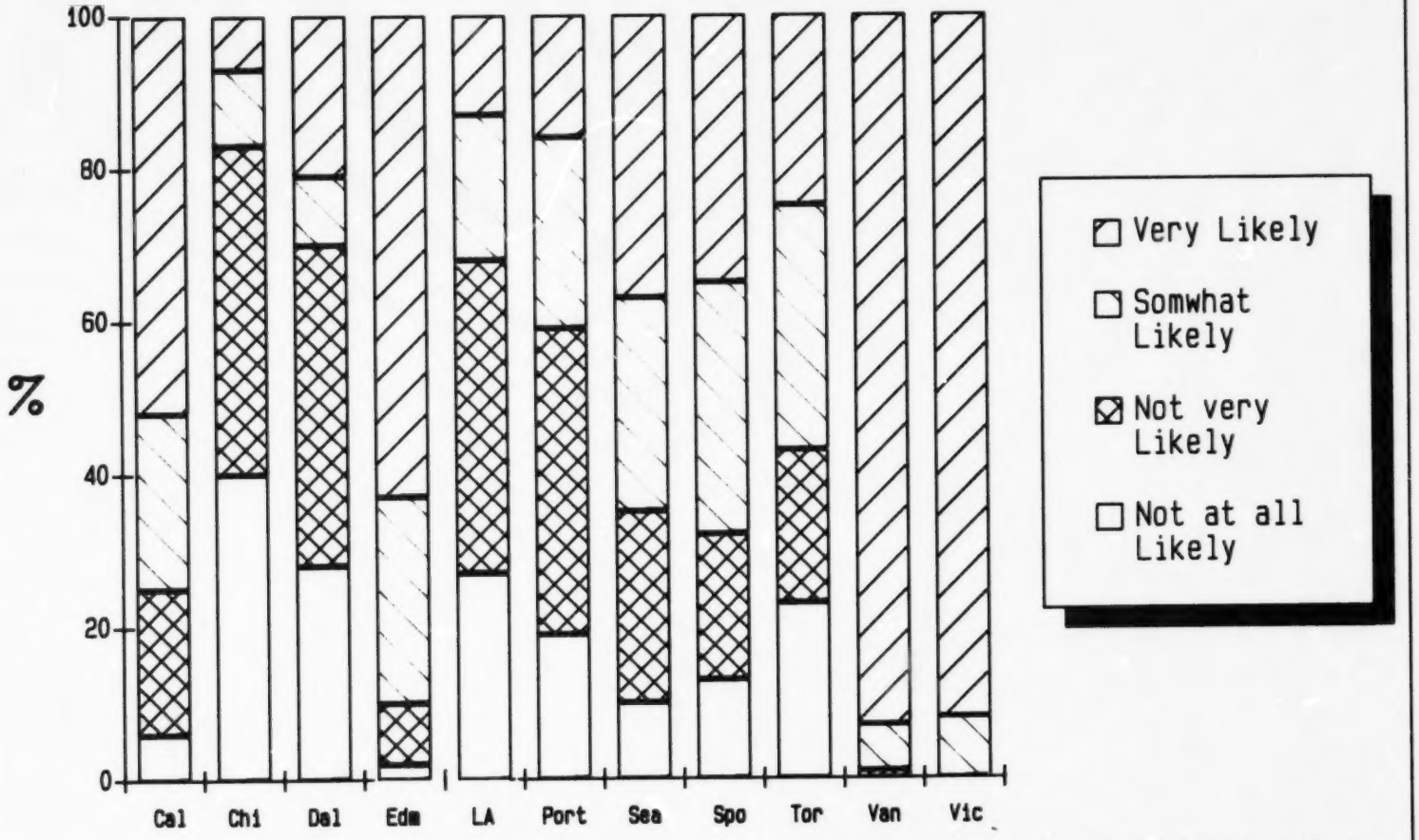


Prepared by Campbell Goodell Consultants

Chart 13 reports the likelihood that a respondent intends to ski in British Columbia in future.

We can see that the likelihood expressed by these skiers of coming to B.C. to ski varies substantially by city. We note in particular that residents of Portland and Seattle seem positively disposed to coming to B.C., in spite of their behaviour to the contrary.

Likelihood of Skiing in B.C. In Future



Prepared by Campbell Goodell Consultants

Chart 14 shows the various ways people get their information about B.C. ski destinations. Word of mouth is obviously most common, followed by print advertising.

Chart 14:

Respondent's Source of Information about Ski Resorts in B.C.

	Percentage Respondents (%)
Word of Mouth	66
Newspaper/Magazine advertising	33
Other material published by resort	20
Own experience	17
Television advertising	16
Travel agent	12
News stories in the area	11
Radio advertising	9
Ski/sporting good stores	3
Ski club	2
Ski shows	1
Tourism offices	1
Other	4
Base	(783)

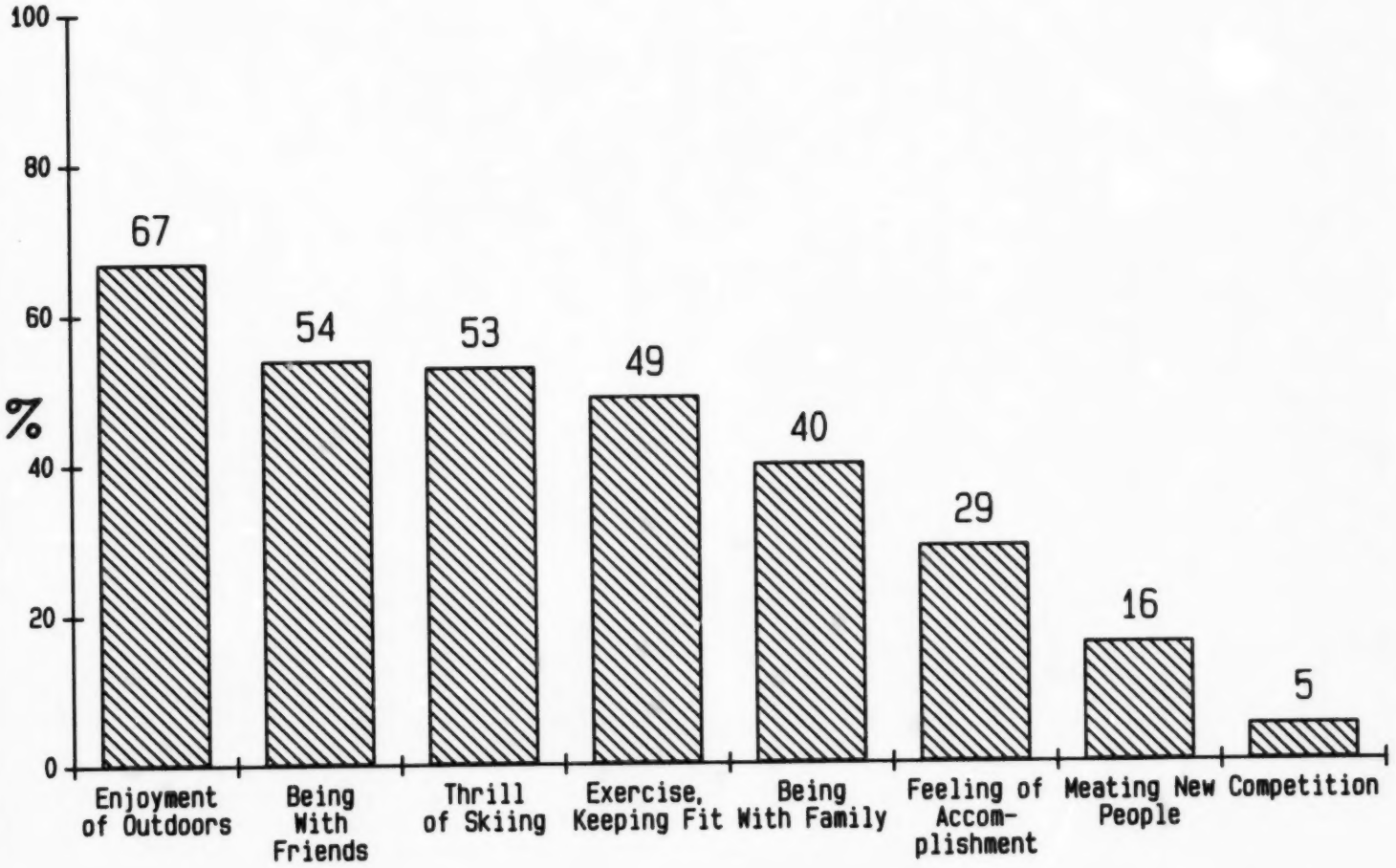
IDENTIFY ATTITUDES OF CONSUMER GROUPS WITH RESPECT TO SKIING AND SPECIFIC FEATURES OF SKI VACATIONS

Chart 15 presents the importance of each of eight basic reasons for skiing.

We see that the enjoyment of the outdoors ranks first by a wide margin, and this is also the case in each of the eleven cities in the sample. Being with friends and the thrill of skiing are a close second and third.

In general, people ski for a mixture of individual esthetic and physical motives on the one hand, and social motives on the other. The balance changes slightly form city to city, but the effective marketing approach will integrate all three. Be aware that the social aspect of skiing generally means family and friends. The apres-ski bar scene is greatly over-rated as an attraction for skiers.

Chart 15: Reason for Skiing



Prepared by Campbell Goodell Consultants

The final set of charts reports the results of questions which asked what is most important to respondents when they choose their ski destination, and also asked them to rate B.C. ski destinations on those same factors.

In these charts, the mean scores for each item on both the performance rating and the importance rating are plotted simultaneously. Items which are rated high both in importance and performance are considered to be "strengths." Items which are rated high on importance but low on performance are seen to be "threats" or "opportunities." Items on which B.C. ski hills perform well, but which are given lower importance scores are labelled "waste," and items which score low on both importance and performance are labelled "neglect."

Keep in mind that these are relative ratings. In fact both performance and importance (which are measured on four point scales with one being high) tend to be rated at the high end of the scale.

The major strengths of B.C. ski destinations in the eyes of this sample of skiers are:

- variety of runs
- staff friendliness
- weather/snow conditions
- quality of overnight accommodations

The major threats/opportunities are:

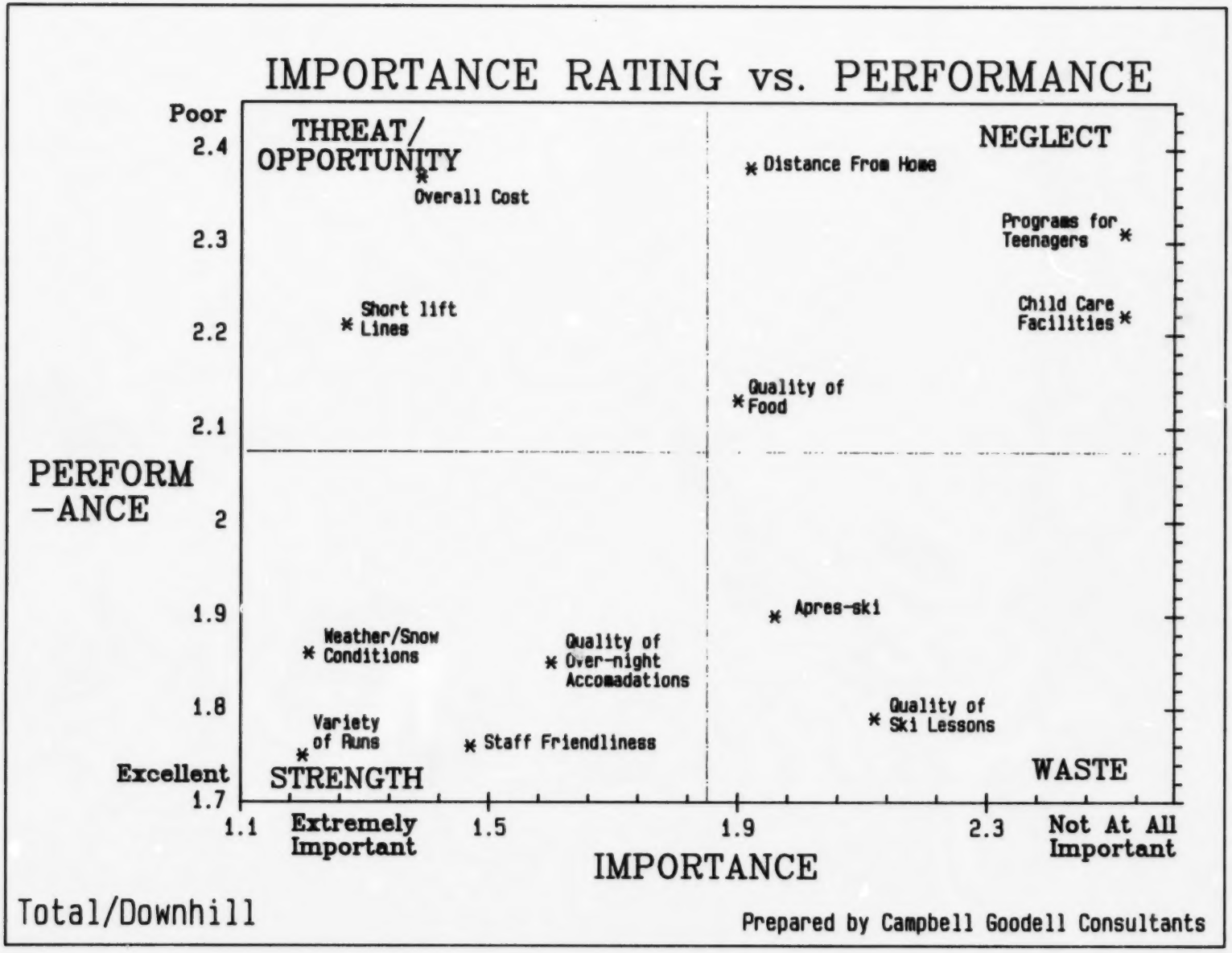
- short lift lines
- overall costs

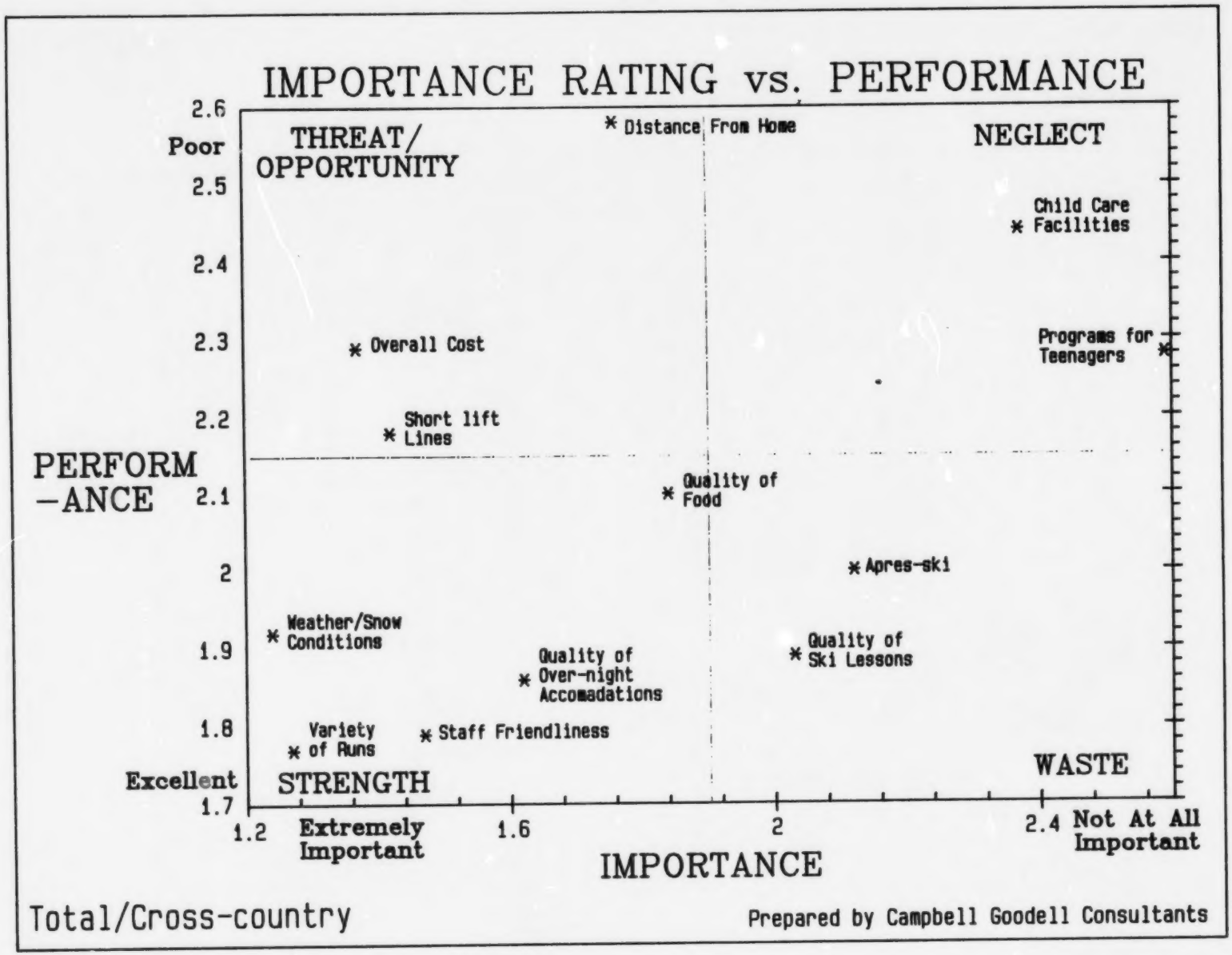
The major areas of waste are:

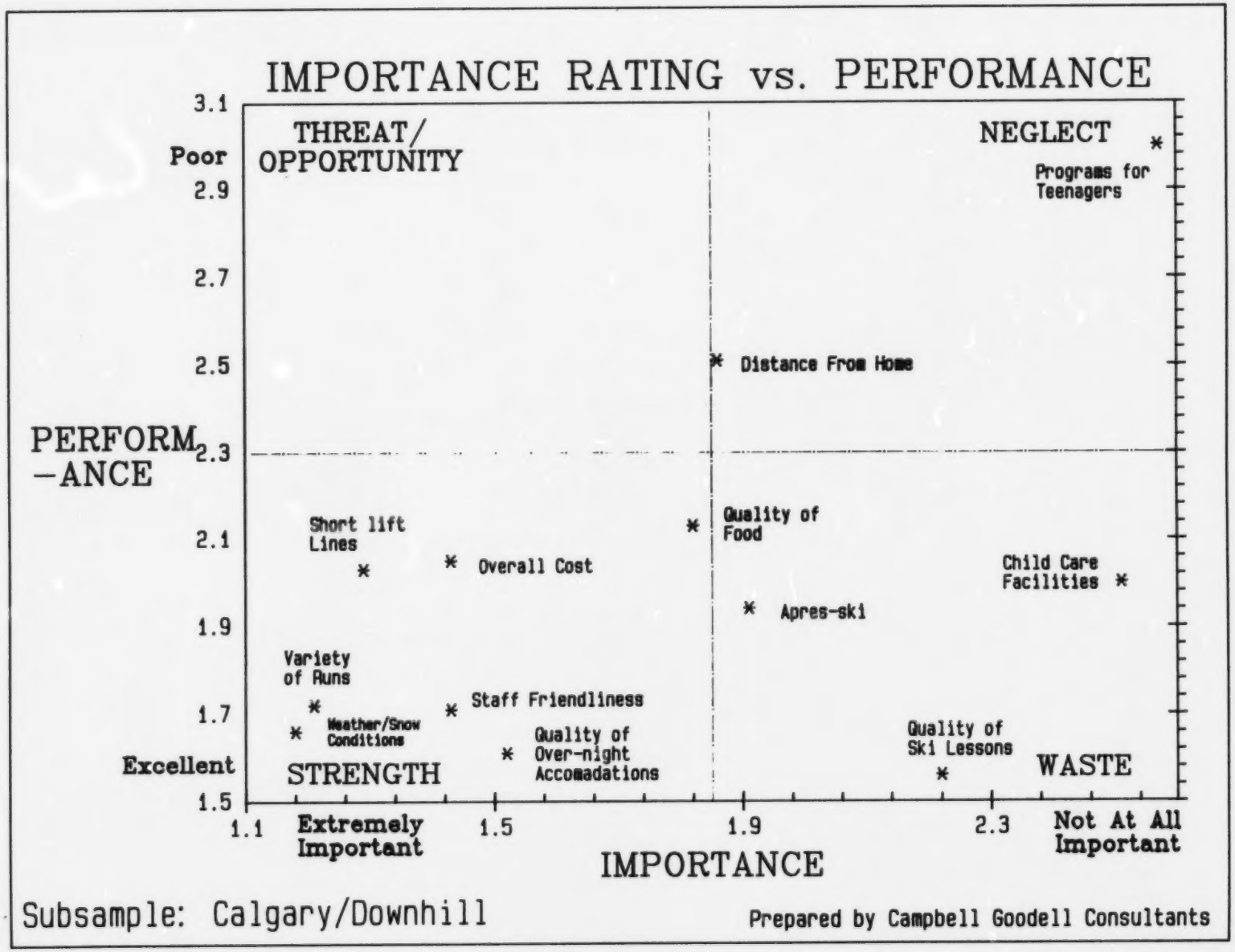
- the apres-ski environment
- the quality of ski lessons

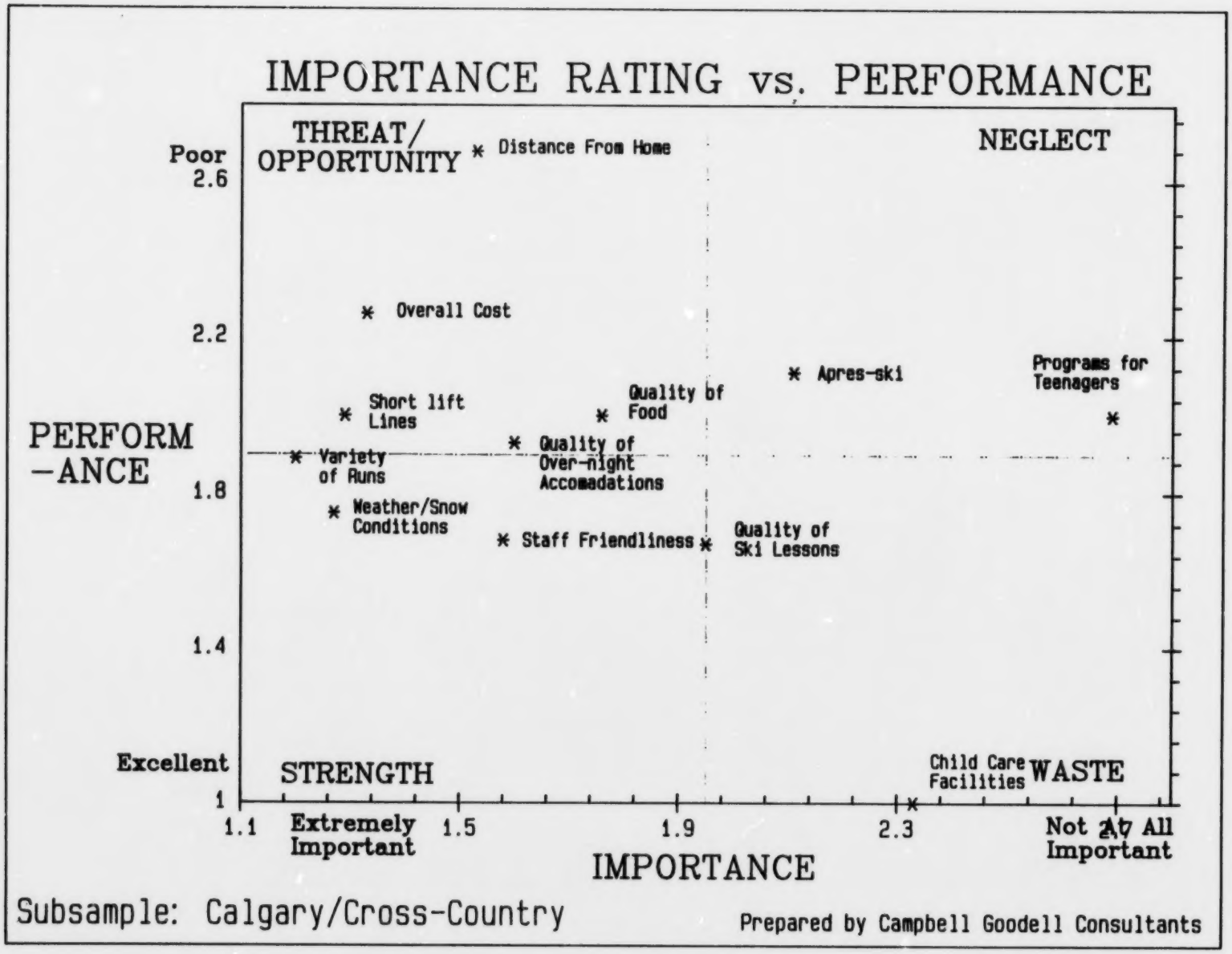
The major areas of neglect are

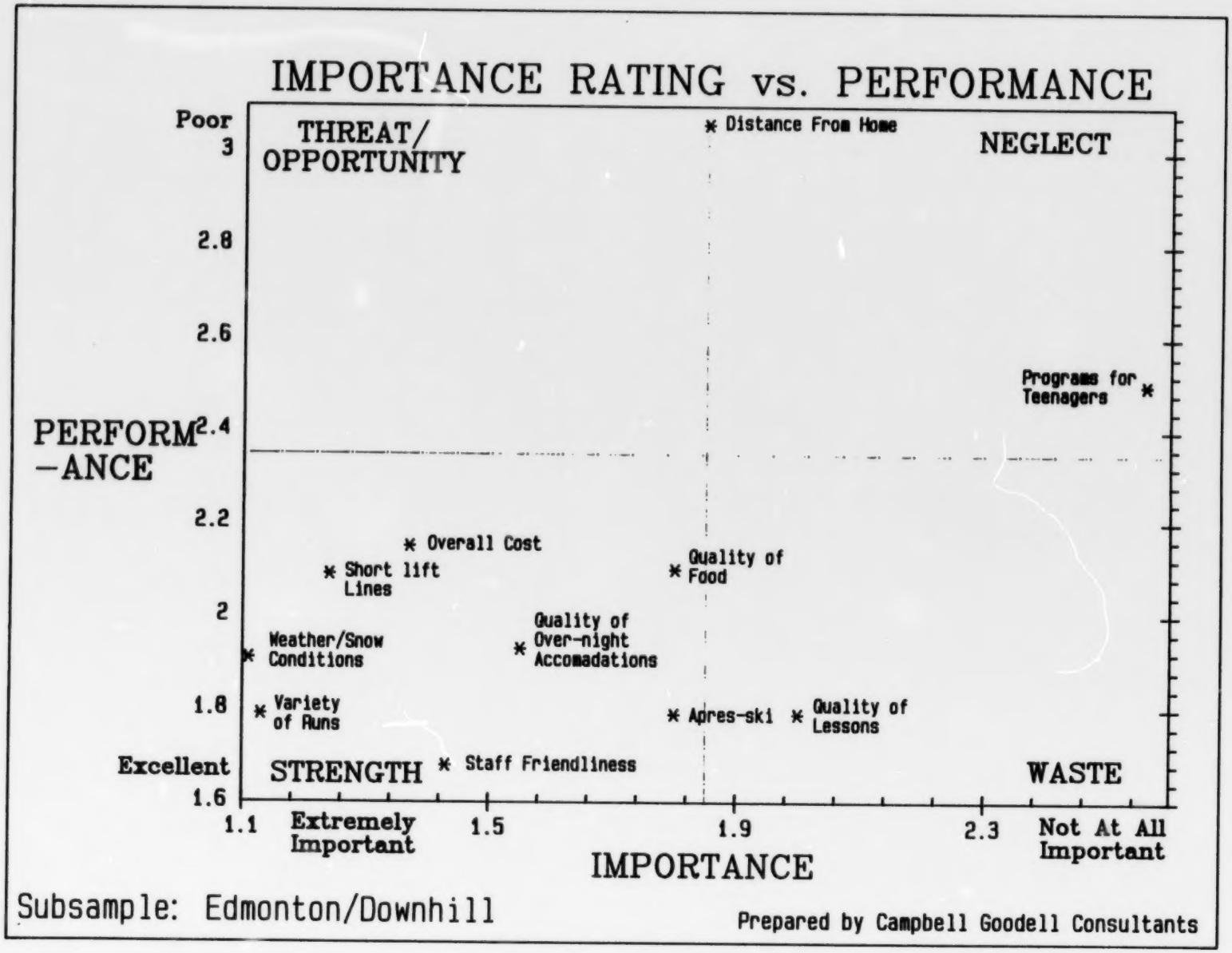
- the quality of the food (marginal)
- child care facilities
- programs for teens
- distance from home

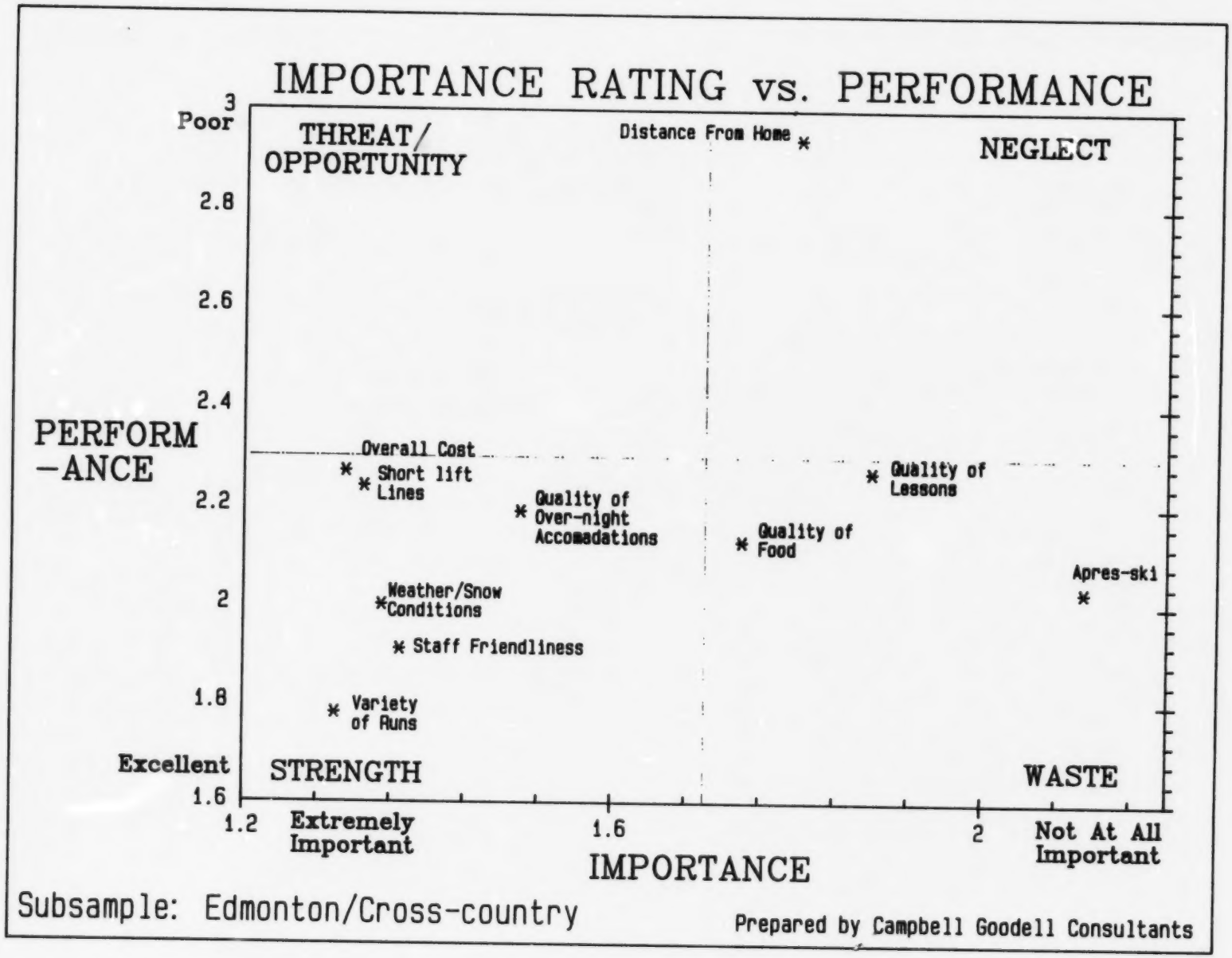

IMPORTANCE RATING vs. PERFORMANCE
Poor
2.4
2.3
2.2
2.1
2
1.9
1.8
Excellent
1.7
PERFORM
-ANCE
THREAT/
OPPORTUNITY
NEGLECT
STRENGTH
WASTE
Overall Cost
Distance From Home
Programs for
Teenagers
Short lift
Lines
Child Care
Facilities
Quality of
Food
Apres-ski
Weather/Snow
Conditions
Quality of
Over-night
Accomadations
Variety
of Runs
Staff Friendliness
Quality of
Ski Lessons
1.1
Extremely
Important
1.5
1.9
2.3
Not At All
Important
IMPORTANCE
Total/Downhill
Prepared by Campbell Goodell Consultants

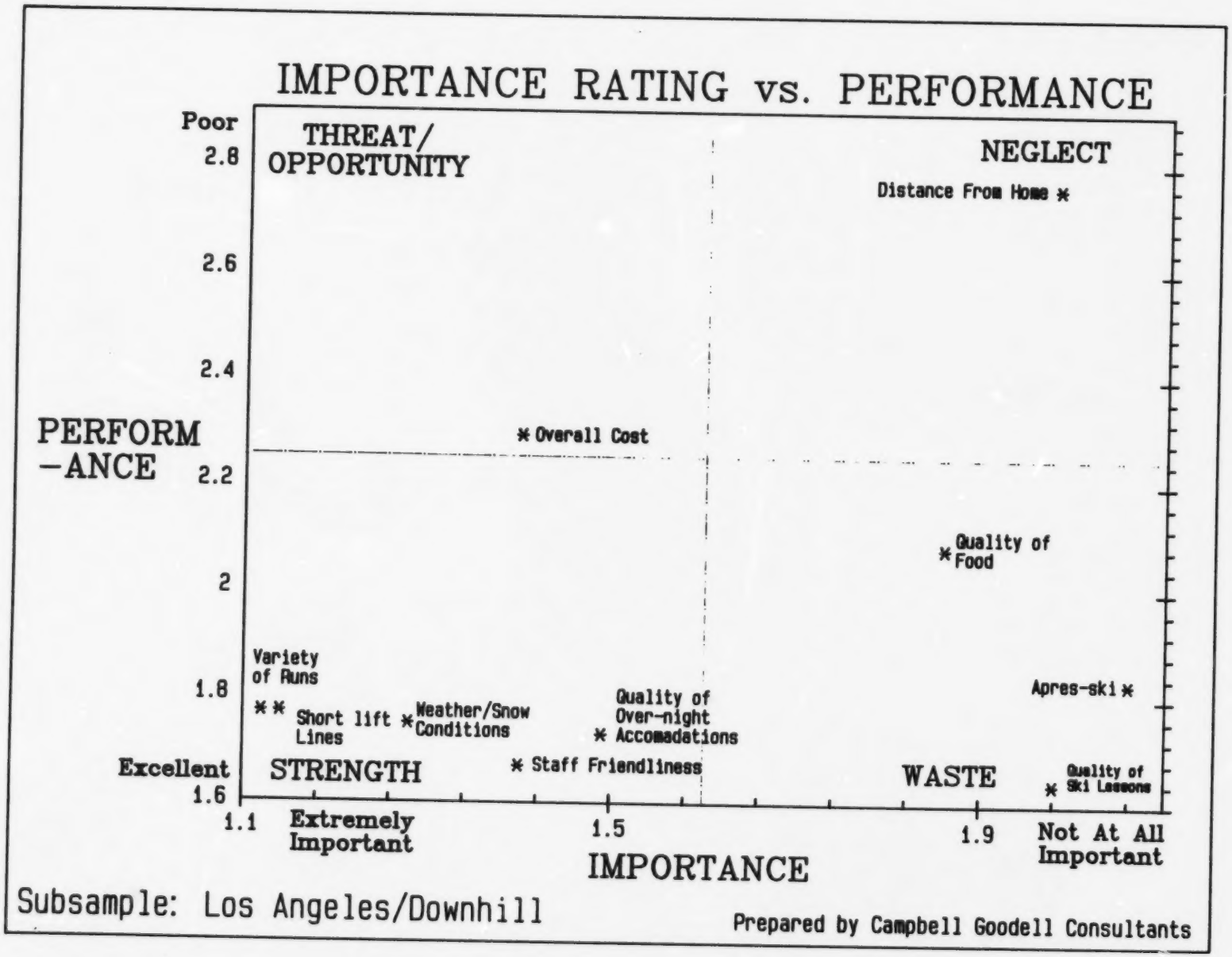

IMPORTANCE RATING vs. PERFORMANCE
2.6
Poor
2.5
2.4
2.3
2.2
PERFORM
-ANCE
2.1
2
1.9
1.8
Excellent
1.7
THREAT/
OPPORTUNITY
Distance From Home
NEGLECT
Child Care
Facilities
Overall Cost
Programs for
Teenagers
Short lift
Lines
Quality of
Food
Apres-ski
Weather/Snow
Conditions
Quality of
Over-night
Accomadations
Quality of
Ski Lessons
Variety
of Runs
Staff Friendliness
STRENGTH
WASTE
1.2
Extremely
Important
1.6
2
2.4
Not At All
Important
IMPORTANCE
Total/Cross-country
Prepared by Campbell Goodell Consultants

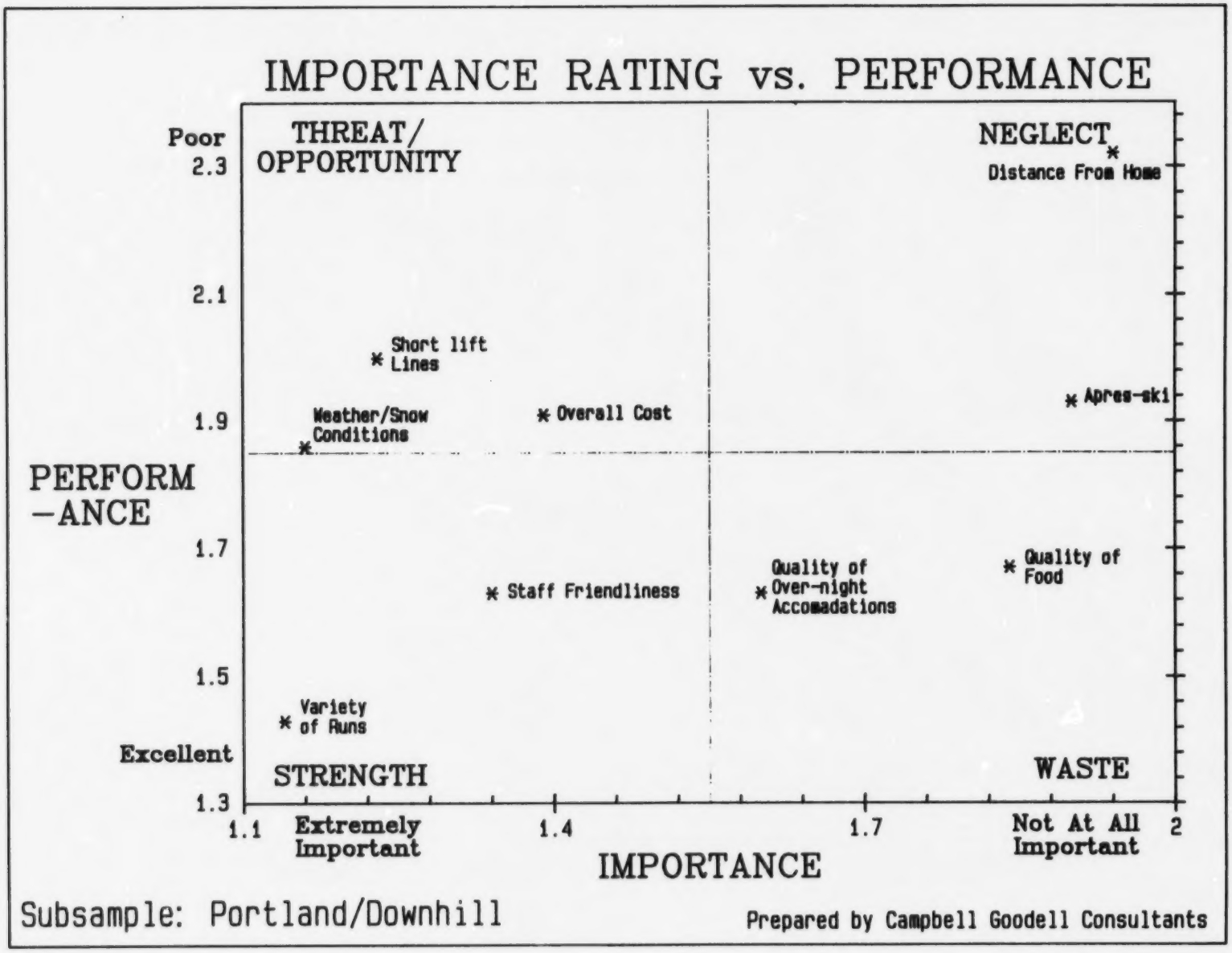

IMPORTANCE RATING vs. PERFORMANCE
3.1
Poor
2.9
2.7
2.5
2.3
2.1
1.9
1.7
Excellent
1.5
PERFORM-ANCE
THREAT/ OPPORTUNITY
NEGLECT
Programs for Teenagers
Distance From Home
Short lift Lines
Overall Cost
Quality of Food
Child Care Facilities
Apres-ski
Variety of Runs
Staff Friendliness
Weather/Snow Conditions
Quality of Over-night Accomadations
Quality of Ski Lessons
STRENGTH
WASTE
1.1
Extremely Important
1.5
1.9
2.3
Not At All Important
IMPORTANCE
Subsample: Calgary/Downhill
Prepared by Campbell Goodell Consultants

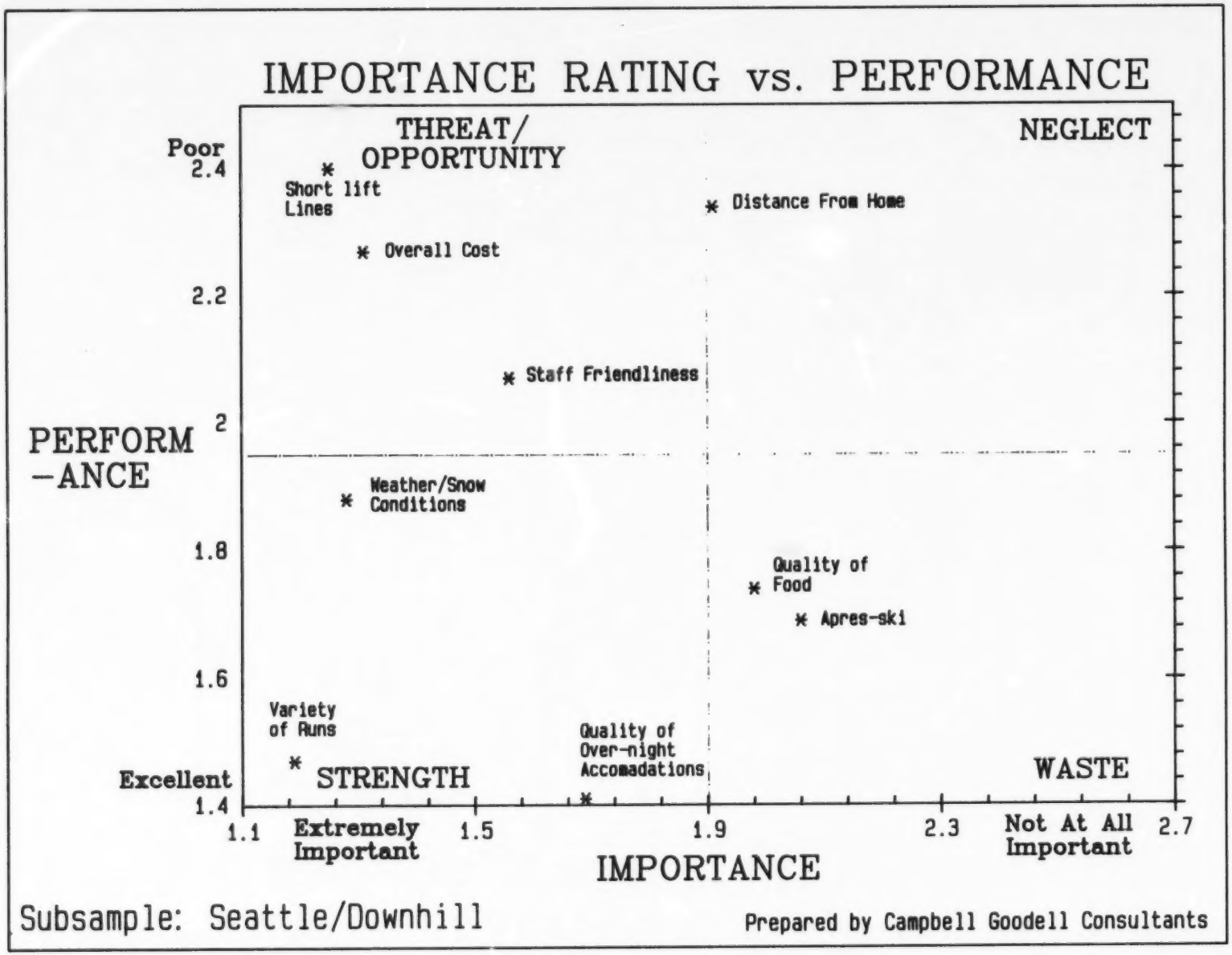

IMPORTANCE RATING vs. PERFORMANCE
THREAT/
OPPORTUNITY
NEGLECT
STRENGTH
WASTE
Poor
2.6
2.2
1.8
1.4
Excellent
1
PERFORM
-ANCE
Distance From Home
Overall Cost
Short lift
Lines
Variety
of Runs
Weather/Snow
Conditions
Quality of
Over-night
Accomadations
Staff Friendliness
Quality of
Food
Apres-ski
Quality of
Ski Lessons
Child Care
Facilities
Programs for
Teenagers
1.1
Extremely
Important
1.5
1.9
2.3
2.7
Not At All
Important
IMPORTANCE
Subsample: Calgary/Cross-Country
Prepared by Campbell Goodell Consultants

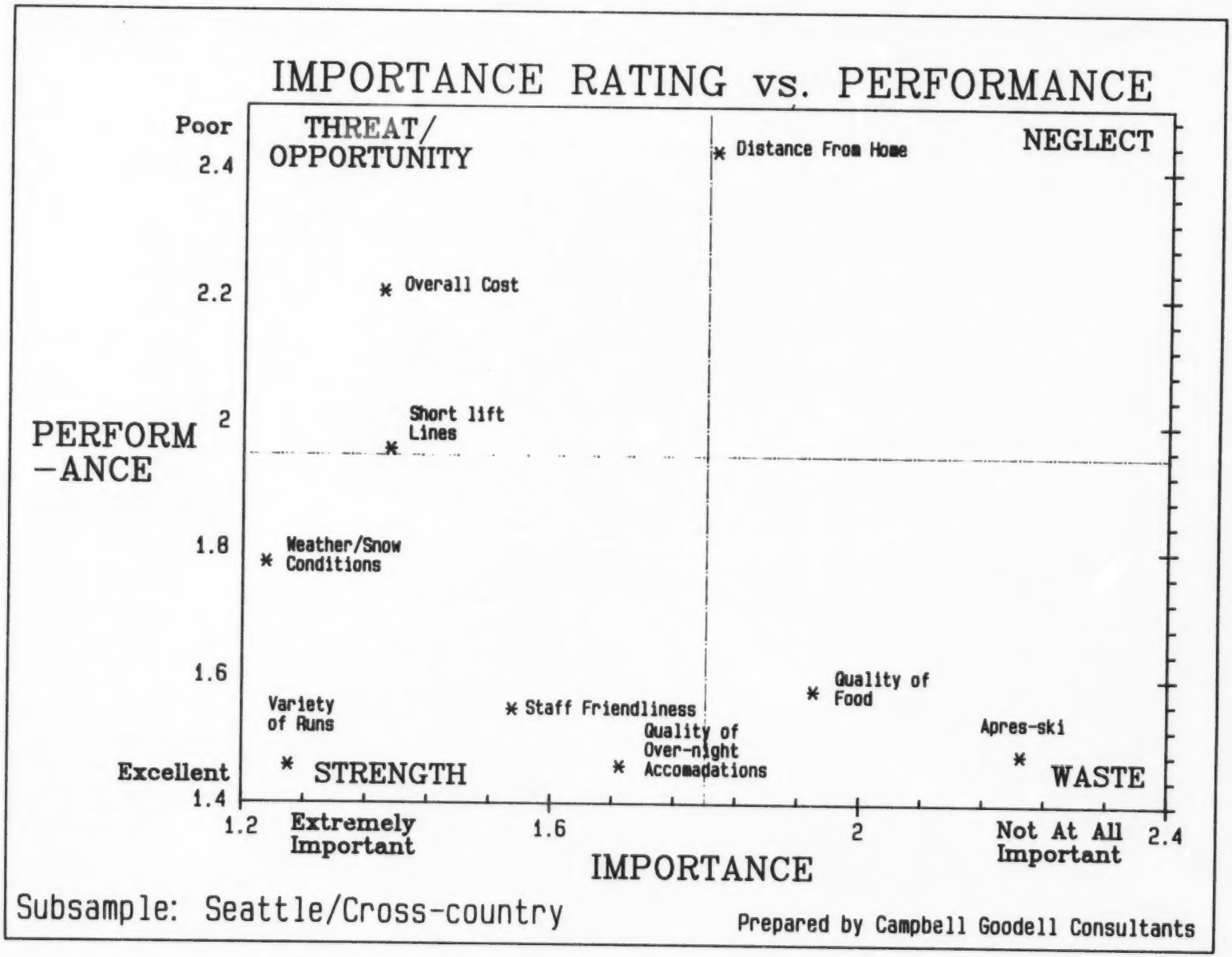

IMPORTANCE RATING vs. PERFORMANCE
Poor
3
2.8
2.6
2.4
2.2
2
1.8
Excellent
1.6
PERFORM-ANCE
THREAT/ OPPORTUNITY
NEGLECT
STRENGTH
WASTE
Distance From Home
Programs for Teenagers
Overall Cost
Short lift Lines
Quality of Food
Quality of Over-night Accomadations
Weather/Snow Conditions
Variety of Runs
Apres-ski
Quality of Lessons
Staff Friendliness
1.1
Extremely Important
1.5
1.9
2.3
Not At All Important
IMPORTANCE
Subsample: Edmonton/Downhill
Prepared by Campbell Goodell Consultants

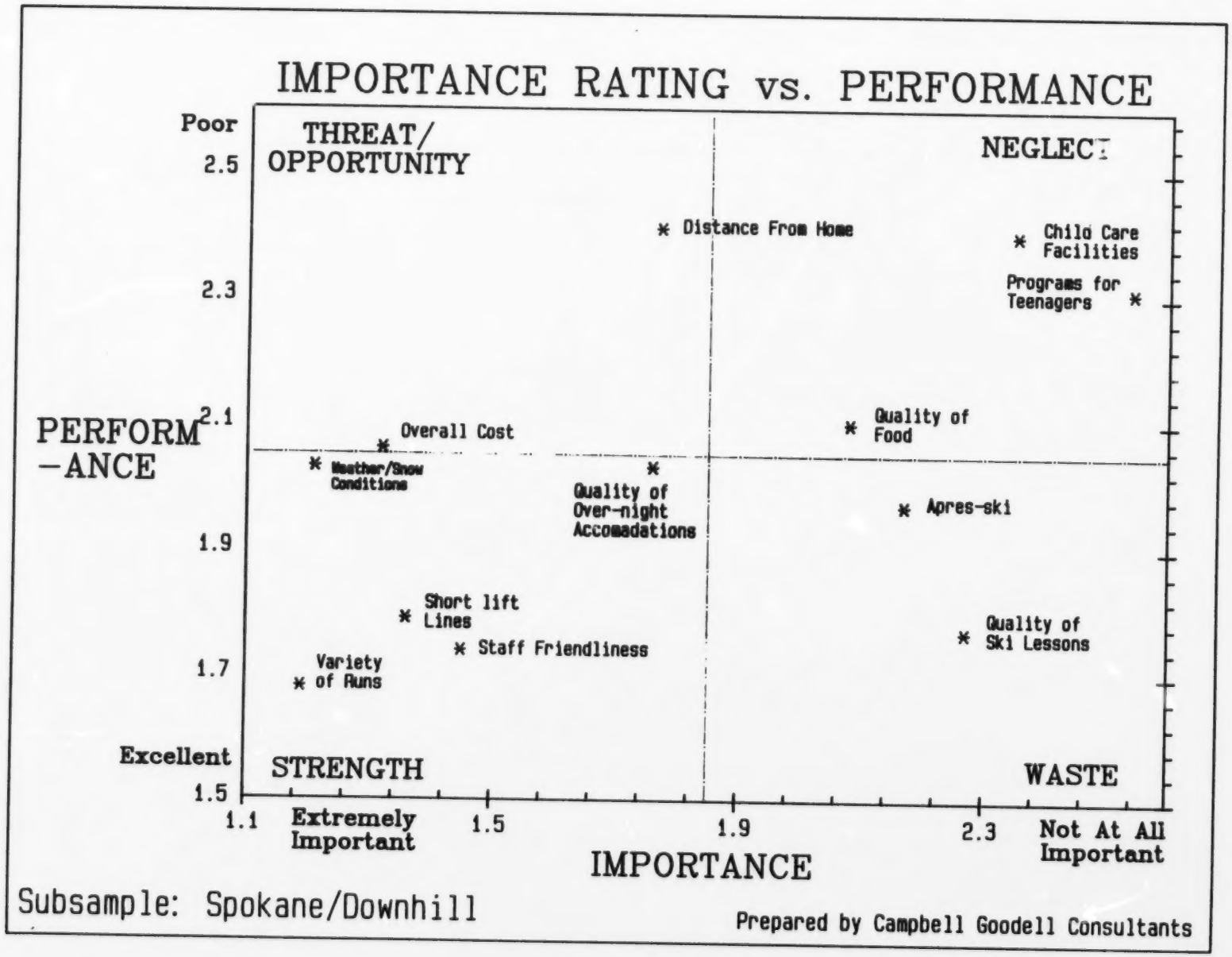

IMPORTANCE RATING vs. PERFORMANCE
Poor
3
2.8
2.6
2.4
2.2
2
1.8
Excellent
1.6
PERFORM
-ANCE
THREAT/
OPPORTUNITY
Distance From Home
NEGLECT
Overall Cost
Short lift
Lines
Quality of
Over-night
Accomadations
Quality of
Food
Quality of
Lessons
Apres-ski
Weather/Snow
Conditions
Staff Friendliness
Variety
of Runs
STRENGTH
WASTE
1.2
Extremely
Important
1.6
2
Not At All
Important
IMPORTANCE
Subsample: Edmonton/Cross-country
Prepared by Campbell Goodell Consultants

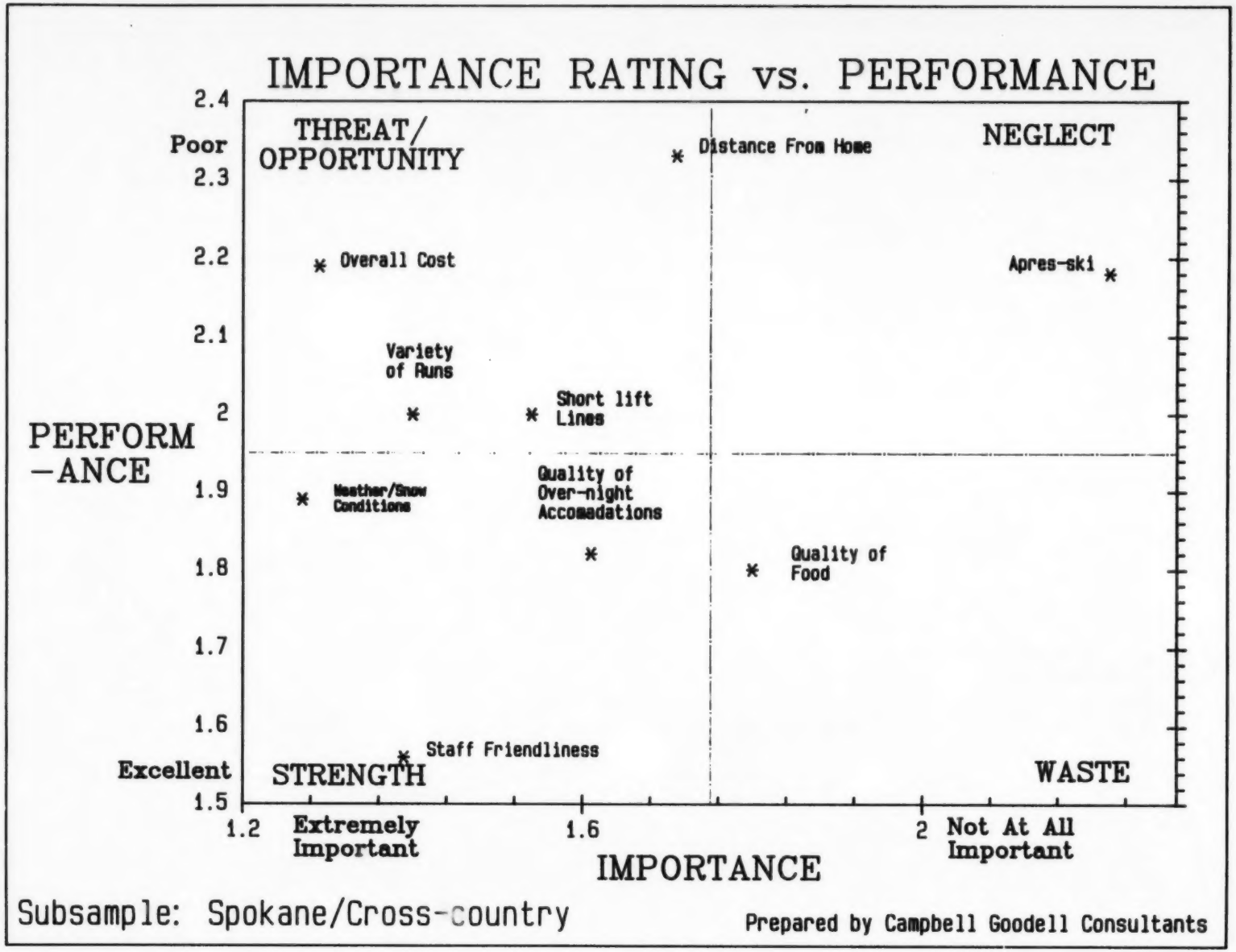

IMPORTANCE RATING vs. PERFORMANCE
Poor
2.8
2.6
2.4
PERFORM
-ANCE
2.2
2
1.8
Excellent
1.6
THREAT/
OPPORTUNITY
NEGLECT
Distance From Home
Overall Cost
Quality of
Food
Variety
of Runs
Short lift
Lines
Weather/Snow
Conditions
Quality of
Over-night
Accomadations
Apres-ski
STRENGTH
Staff Friendliness
WASTE
Quality of
Ski Lessons
1.1
Extremely
Important
1.5
1.9
Not At All
Important
IMPORTANCE
Subsample: Los Angeles/Downhill
Prepared by Campbell Goodell Consultants

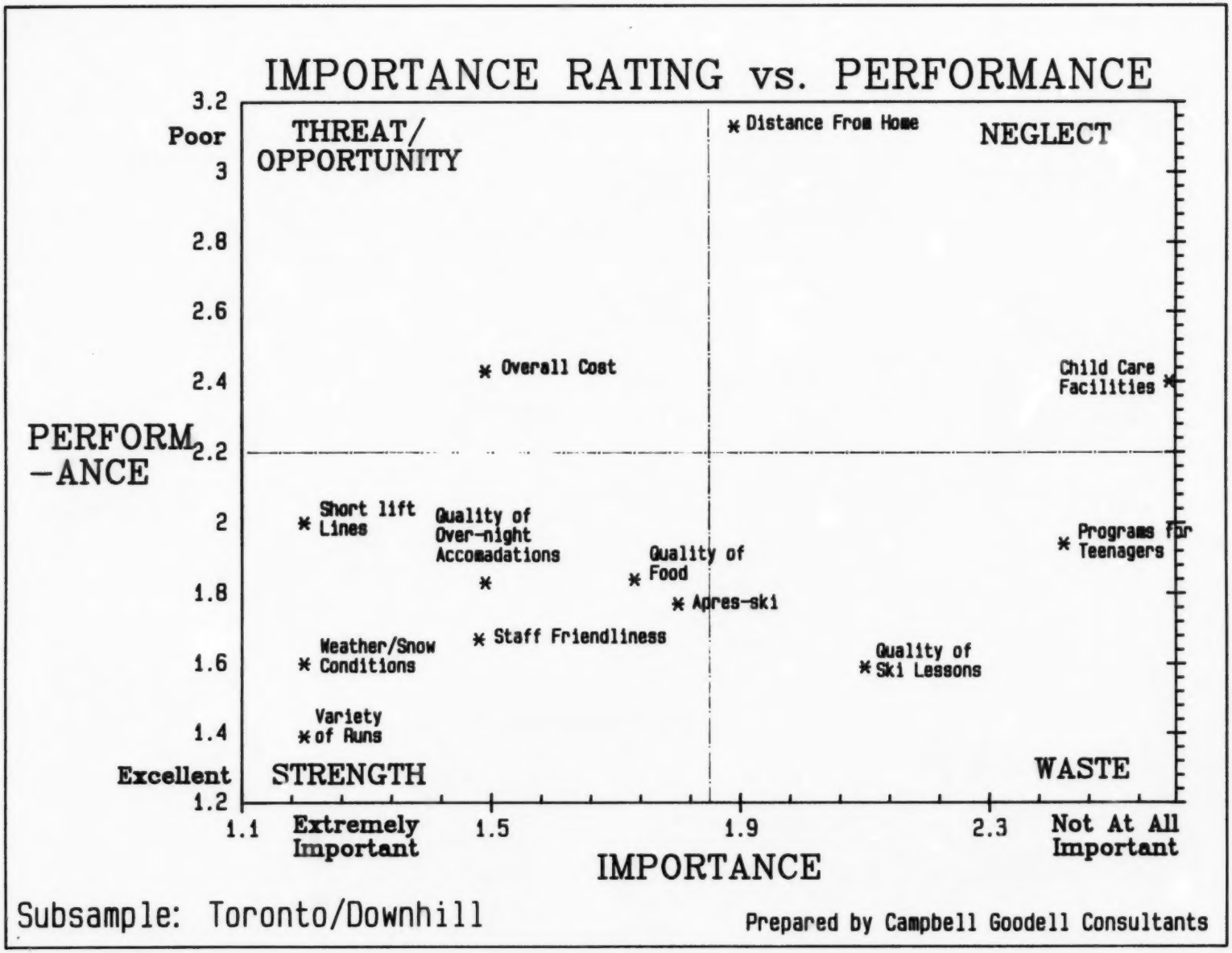

IMPORTANCE RATING vs. PERFORMANCE
Poor
2.3
2.1
1.9
1.7
1.5
Excellent
1.3
PERFORM
-ANCE
THREAT/
OPPORTUNITY
NEGLECT
Distance From Home
Short lift
Lines
Weather/Snow
Conditions
Overall Cost
Apres-ski
Staff Friendliness
Quality of
Over-night
Accomadations
Quality of
Food
Variety
of Runs
STRENGTH
WASTE
1.1
Extremely
Important
1.4
1.7
Not At All
Important
2
IMPORTANCE
Subsample: Portland/Downhill
Prepared by Campbell Goodell Consultants

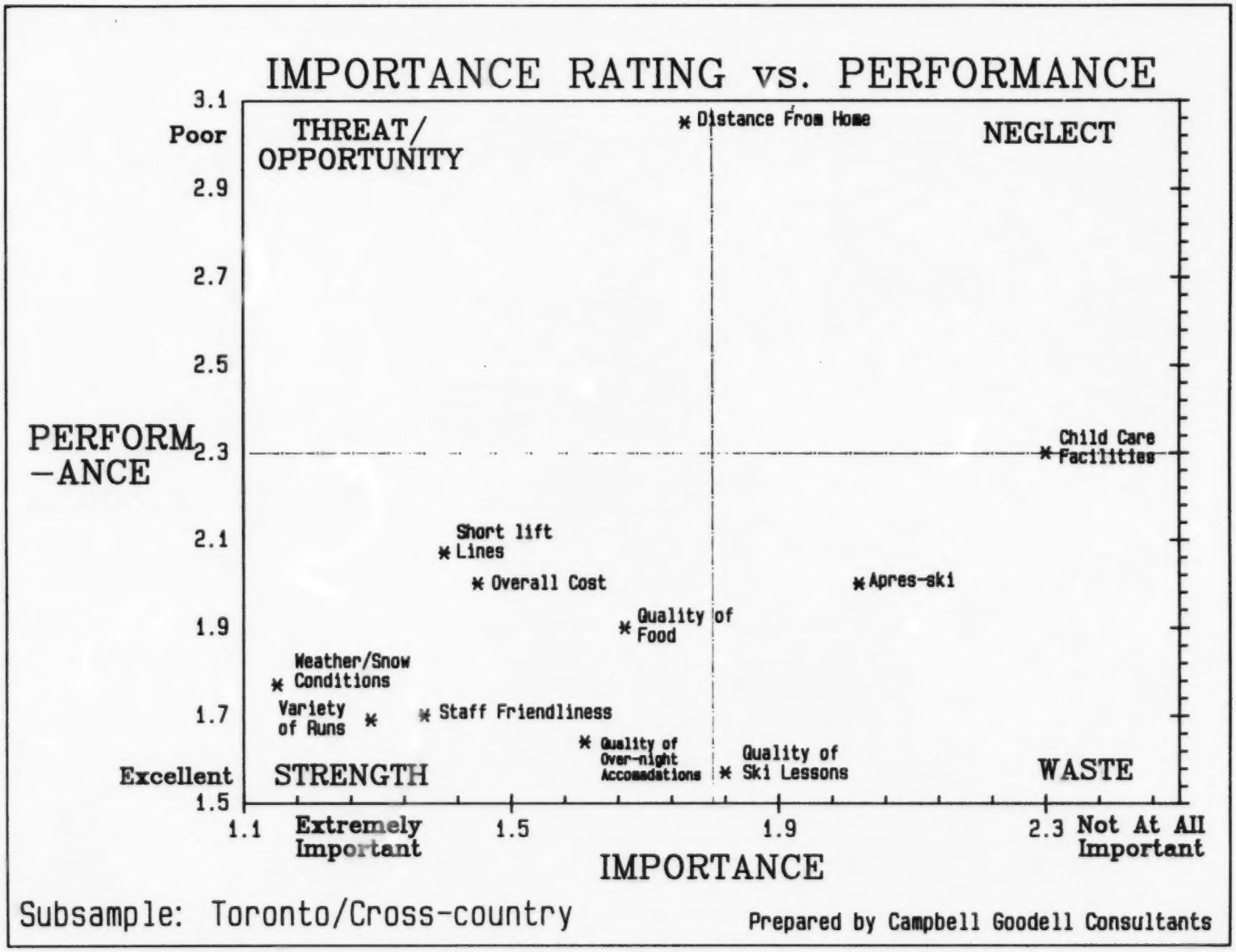

IMPORTANCE RATING vs. PERFORMANCE
THREAT/
OPPORTUNITY
NEGLECT
Poor
2.4
Short lift
Lines
Distance From Home
Overall Cost
2.2
Staff Friendliness
PERFORM
-ANCE
2
Weather/Snow
Conditions
1.8
Quality of
Food
Apres-ski
1.6
Variety
of Runs
Quality of
Over-night
Accomadations
Excellent
1.4
STRENGTH
WASTE
1.1
Extremely
Important
1.5
1.9
2.3
Not At All
Important
2.7
IMPORTANCE
Subsample: Seattle/Downhill
Prepared by Campbell Goodell Consultants

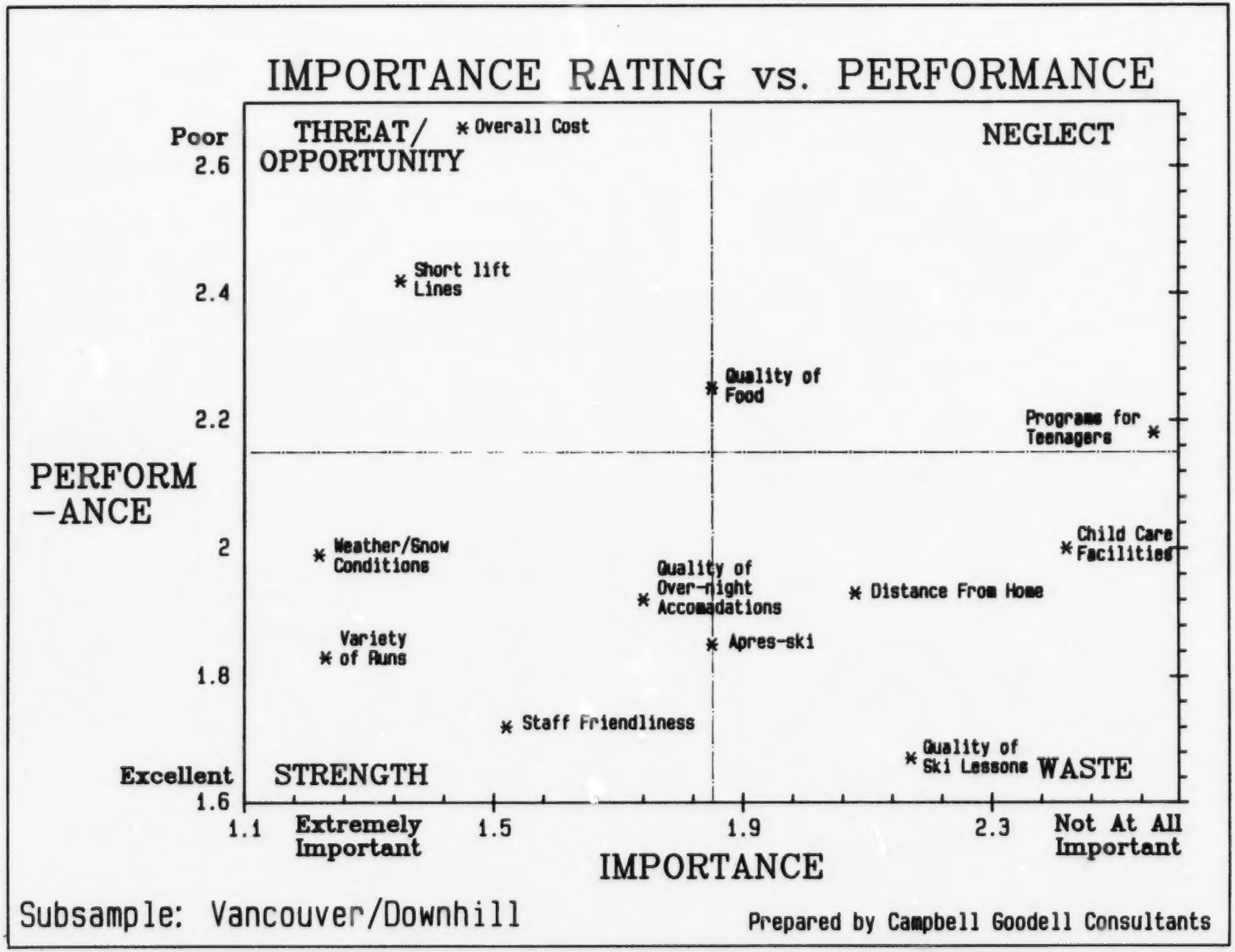

IMPORTANCE RATING vs. PERFORMANCE
Poor
2.4
2.2
2
1.8
1.6
Excellent
1.4
PERFORM
-ANCE
THREAT/
OPPORTUNITY
NEGLECT
STRENGTH
WASTE
Distance From Home
Overall Cost
Short lift
Lines
Weather/Snow
Conditions
Variety
of Runs
Staff Friendliness
Quality of
Over-night
Accomadations
Quality of
Food
Apres-ski
1.2
Extremely
Important
1.6
2
Not At All
Important
2.4
IMPORTANCE
Subsample: Seattle/Cross-country
Prepared by Campbell Goodell Consultants

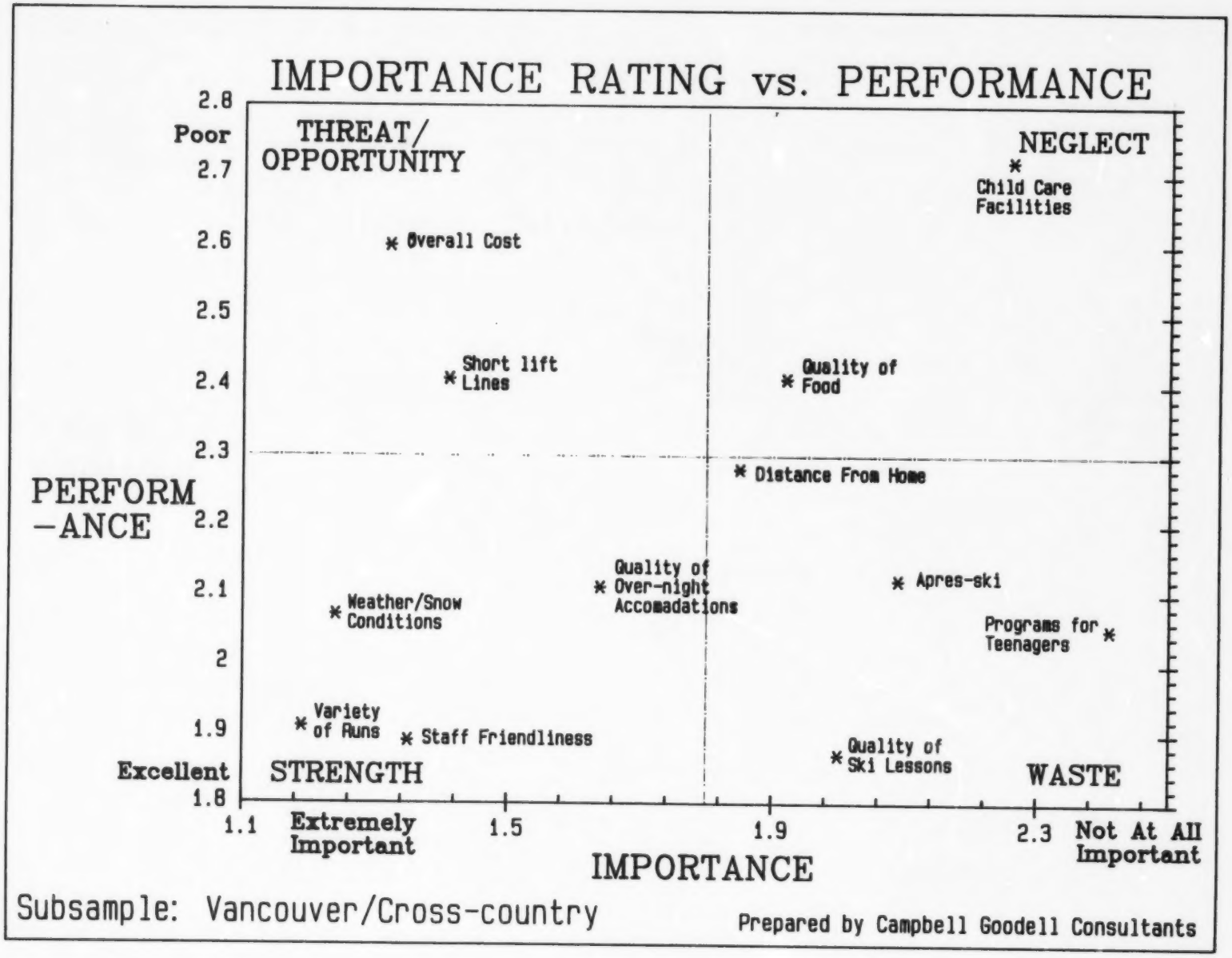

IMPORTANCE RATING vs. PERFORMANCE
Poor
2.5
2.3
2.1
1.9
1.7
Excellent
1.5
PERFORM
-ANCE
THREAT/
OPPORTUNITY
NEGLECT
STRENGTH
WASTE
Distance From Home
Child Care
Facilities
Programs for
Teenagers
Overall Cost
Quality of
Food
Weather/Snow
Conditions
Quality of
Over-night
Accomadations
Apres-ski
Short lift
Lines
Staff Friendliness
Quality of
Ski Lessons
Variety
of Runs
1.1
Extremely
Important
1.5
1.9
2.3
Not At All
Important
IMPORTANCE
Subsample: Spokane/Downhill
Prepared by Campbell Goodell Consultants

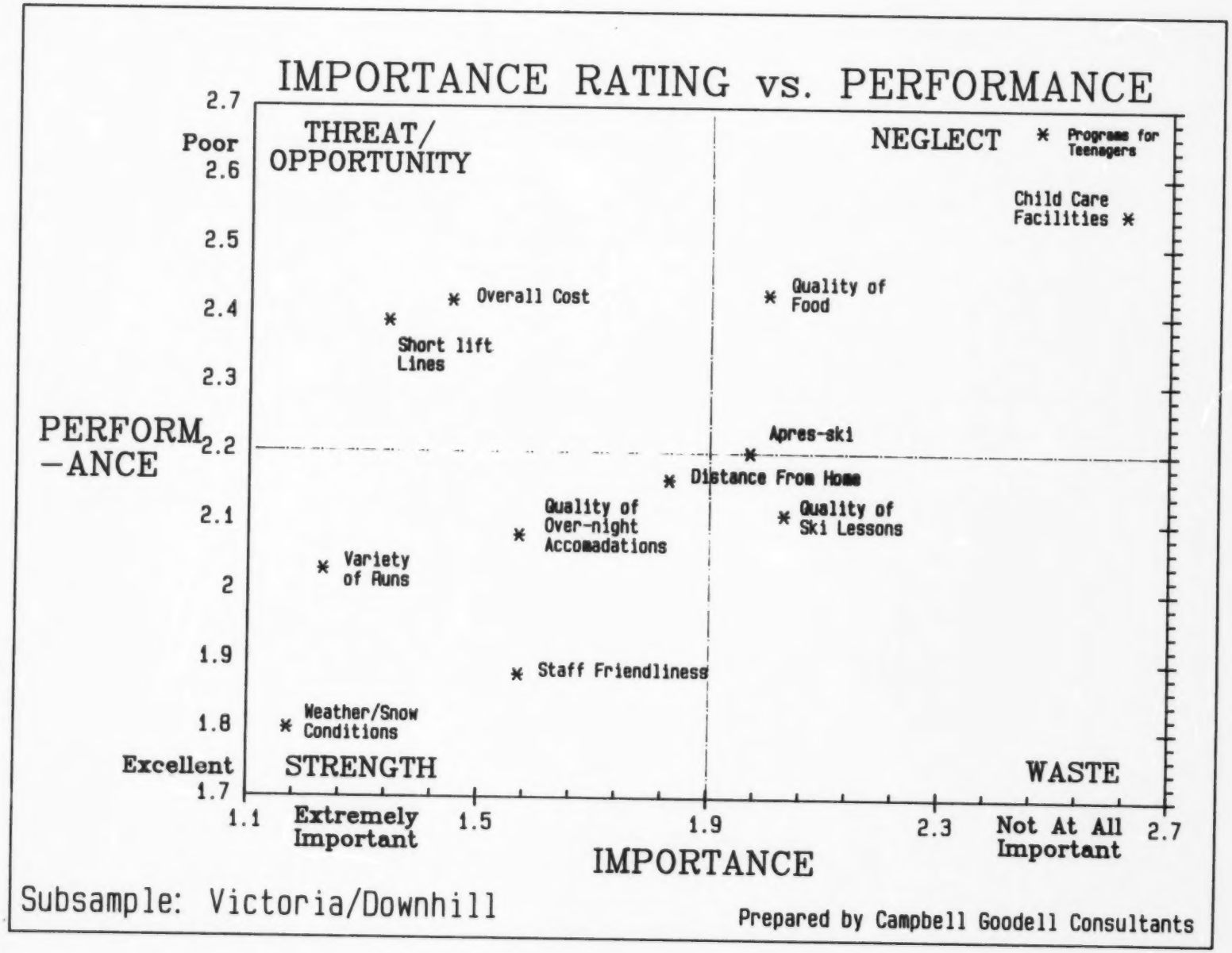

IMPORTANCE RATING vs. PERFORMANCE
2.4
Poor
2.3
2.2
2.1
2
1.9
1.8
1.7
1.6
Excellent
1.5
PERFORM
-ANCE
THREAT/
OPPORTUNITY
NEGLECT
STRENGTH
WASTE
Distance From Home
Overall Cost
Apres-ski
Variety
of Runs
Short lift
Lines
Weather/Snow
Conditions
Quality of
Over-night
Accomodations
Quality of
Food
Staff Friendliness
1.2
Extremely
Important
1.6
2
Not At All
Important
IMPORTANCE
Subsample: Spokane/Cross-country
Prepared by Campbell Goodell Consultants

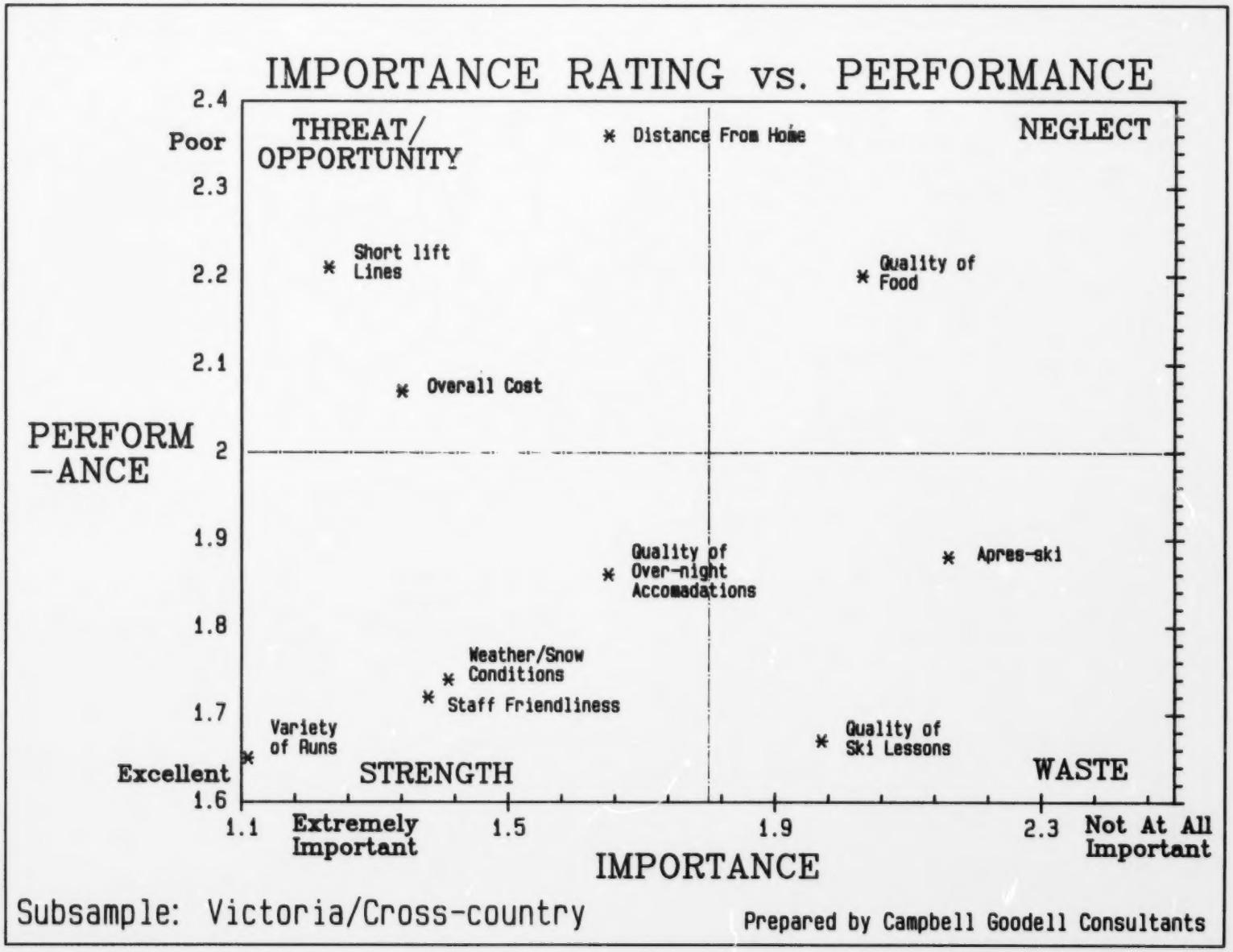

IMPORTANCE RATING vs. PERFORMANCE
3.2
Poor
3
2.8
2.6
2.4
2.2
2
1.8
1.6
1.4
Excellent
1.2
PERFORM-ANCE
THREAT/ OPPORTUNITY
NEGLECT
STRENGTH
WASTE
Distance From Home
Overall Cost
Child Care Facilities
Short lift Lines
Quality of Over-night Accomadations
Quality of Food
Apres-ski
Programs For Teenagers
Staff Friendliness
Weather/Snow Conditions
Quality of Ski Lessons
Variety of Runs
1.1
Extremely Important
1.5
1.9
2.3
Not At All Important
IMPORTANCE
Subsample: Toronto/Downhill
Prepared by Campbell Goodell Consultants


IMPORTANCE RATING vs. PERFORMANCE
3.1
Poor
2.9
2.7
2.5
PERFORM-ANCE
2.3
2.1
1.9
1.7
Excellent
1.5
THREAT/ OPPORTUNITY
Distance From Home
NEGLECT
Child Care Facilities
Short lift Lines
Overall Cost
Apres-ski
Quality of Food
Weather/Snow Conditions
Variety of Runs
Staff Friendliness
Quality of Over-night Accomodations
Quality of Ski Lessons
STRENGTH
WASTE
1.1
Extremely Important
1.5
1.9
2.3
Not At All Important
IMPORTANCE
Subsample: Toronto/Cross-country
Prepared by Campbell Goodell Consultants


IMPORTANCE RATING vs. PERFORMANCE
Poor
2.6
2.4
2.2
2
1.8
Excellent
1.6
PERFORM
-ANCE
THREAT/
OPPORTUNITY
Overall Cost
NEGLECT
Short lift
Lines
Quality of
Food
Programs for
Teenagers
Child Care
Facilities
Weather/Snow
Conditions
Quality of
Over-night
Accomadations
Distance From Home
Variety
of Runs
Apres-ski
Staff Friendliness
Quality of
Ski Lessons
STRENGTH
WASTE
1.1
Extremely
Important
1.5
1.9
2.3
Not At All
Important
IMPORTANCE
Subsample: Vancouver/Downhill
Prepared by Campbell Goodell Consultants


IMPORTANCE RATING vs. PERFORMANCE
2.8
Poor
2.7
2.6
2.5
2.4
2.3
2.2
2.1
2
1.9
Excellent
1.8
PERFORM
-ANCE
THREAT/
OPPORTUNITY
NEGLECT
Child Care
Facilities
Overall Cost
Short lift
Lines
Quality of
Food
Distance From Home
Quality of
Over-night
Accomadations
Apres-ski
Weather/Snow
Conditions
Programs for
Teenagers
Variety
of Runs
Staff Friendliness
Quality of
Ski Lessons
STRENGTH
WASTE
1.1
Extremely
Important
1.5
1.9
2.3
Not At All
Important
IMPORTANCE
Subsample: Vancouver/Cross-country
Prepared by Campbell Goodell Consultants


IMPORTANCE RATING vs. PERFORMANCE
THREAT/
OPPORTUNITY
NEGLECT
Programs for Teenagers
Child Care Facilities
Overall Cost
Quality of Food
Short lift Lines
Apres-ski
Distance From Home
Quality of Over-night Accomadations
Quality of Ski Lessons
Variety of Runs
Staff Friendliness
Weather/Snow Conditions
STRENGTH
WASTE
PERFORM-ANCE
2.7
Poor
2.6
2.5
2.4
2.3
2.2
2.1
2
1.9
1.8
Excellent
1.7
1.1
Extremely Important
1.5
1.9
2.3
Not At All Important
2.7
IMPORTANCE
Subsample: Victoria/Downhill
Prepared by Campbell Goodell Consultants



Queen's Printer for British Columbia©
Victoria, 1989